



Epworth United Methodist Church
4802 N. 59th Avenue
Phoenix, AZ 85033-1702

PLEASE
APPLY
POSTAGE
BEFORE
MAILING

Q: May I see a free, individualized Benefits Report without obligation?

A: YES!

Provide the information requested on the brochure's form. The information will be used to produce an individualized, Benefits Report that will detail the amount of your income tax deduction, your payout rate, your annual income and how much of the annual income will be tax-free. The report is easy to understand and there is no obligation expected in return for producing this free report.

To receive your free report, provide the information requested on the brochure's form and return the form to any member of the Epworth Foundation.

RATES

SINGLE LIFE		TWO LIVES	
Age	Rate	Ages	Rate
65	6.3	65 & 65	5.8
68	6.5	68 & 68	6.0
70	6.7	70 & 70	6.1
73	7.0	73 & 73	6.3
75	7.3	75 & 75	6.5
80	8.3	80 & 80	7.1
85	9.7		

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623 - 846 - 0610

Epworth
UMC
Foundation

Charitable
Gift
Annuity

HIGH RETURN
&
(NO WORRY)

Get a Higher Rate of Return on Your Investments with an Epworth United Methodist Foundation Gift Annuity.

Why Should You Consider a Charitable Gift Annuity?

Certificates of Deposit and U.S. Treasuries are paying dismal returns. The stock market has been flat or down for two years, causing added uncertainty and diminishing returns for many.

A Gift Annuity not only offers some of the best rates available anywhere, but it also provides a safe and secure way to increase your income. Additionally, a Gift Annuity provides you an opportunity to provide significant support for the Epworth United Methodist Church.

BENEFITS:

- 1. Increased, Guaranteed, Lifetime Income!**
- 2. Immediate Tax Benefits:**
 - A. Deductions**
 - B. Tax-Free Income!**
- 3. Future Support For Epworth UMC.**

How Does It Work?

1. You donate a minimum of \$5,000 to the Desert Southwest United Methodist Foundation (DSUMF), our Gift Annuity managing partner.
2. In exchange, the DSUMF will guarantee a fixed, quarterly annuity payment to you and/or your spouse for life.
3. After life, Epworth UMC Foundation will receive 88% of the funds remaining in your annuity account; DSUMF will receive 12% in order to offset its investment management and administrative costs during your lifetime.

EXAMPLES:

In January of 2003, Mr. Bell, age 77, donates \$20,000 in appreciated stock to DSUMF for a one-life gift annuity. The stock's cost basis is \$5,000. The Foundation's annuity rate for a 77 year old is 7.6%. Thus, Mr. Bell's fixed annual annuity is \$1,520 of which \$260 is tax-free income. Mr. Bell can receive his annuity in quarterly payments. Also, if Mr. Bell itemizes on his tax return, he qualifies for an income tax deduction of \$8,467 for this gift.

In January of 2003, Mr. & Mrs. Smith, ages 79 & 80 donate \$20,000 in cash for a two-life gift annuity. Their annuity rate is 7.1%, thus their fixed annual annuity is \$1,420 of which \$973 is tax free. In addition, if the Smiths itemize on their tax return, they qualify for an income tax deduction of \$7,258.

PLEASE REMEMBER, THESE GIFTS ARE BOTH DATE AND AGE SENSITIVE. YOUR RESULTS WILL VARY!

Provide the information requested below, attach the dotted line above and mail or give to a representative of Epworth UMC Foundation.

PLEASE PRINT!

NAME: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

CHECK A BOX: ONE-LIFE GIFT ANNUITY TWO-LIFE GIFT ANNUITY

TYPE OF GIFT: CASH: Amount: \$ _____ Stock Symbol: _____
 STOCK: # of Shares: _____ Cost Basis: \$ _____
 Fair Market Value: \$ _____

1ST ANNUITANT'S BIRTHDATE: Month: _____ Day: _____ Year: _____

2ND ANNUITANT'S BIRTHDATE: Month: _____ Day: _____ Year: _____