

WHILE IT IS TRUE THAT A PLAN DOES
BENEFIT YOUR FAMILY, FRIENDS AND
CHERISHED CAUSES, THE MAIN
BENEFICIARY IS YOU.



When you have a plan, you live every
day knowing your harvest will not go to
waste. Everything you have worked for
all your life and all you have invested in
those around you will be cultivated and
cared for, even when you are no longer
here to do it.

Let us help you reap what you have sown.
Visit our website, call or email us to learn
of all the free tools we have for you.

The names and images shown here are representative of typical
donors and may or may not be actual donors to the organization.
Under federal rules your benefits may be different from this
example. Please contact us for your specific benefits.
22AB12

How Can We Help?

- ☐ Please contact me with more information about
planned gifts and estate planning strategies.
- ☐ I have already included your organization in my will
or trust.
- ☐ Please send me your **FREE** estate planning guide.

The best way to contact me is by:

☐ Email ☐ Mail ☐ Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

(All inquiries are treated with complete confidentiality.)

This information is not intended as tax, legal or financial advice.
Gift results may vary. Consult your personal financial advisor for
information specific to your situation.



Desert Southwest
UNITED METHODIST FOUNDATION
602.798.8202 | www.dsumf.org
1300 South Litchfield Road, Suite 110B, Goodyear, AZ 85338

Copyright © 2022 Crescendo Interactive, Inc. Used by permission.

Harvest

Your Legacy



**Desert
Southwest**
UNITED METHODIST
FOUNDATION



OUR LEGACY IS NOT WHAT WE
HOLD IN OUR HANDS, BUT WHAT
WE HARBOR IN OUR HEART.

FALL Harvest

Unlike any other season, fall is the time to come together. We gather friends. We gather family. We gather the produce of the field and celebrate the fruits of our labor. Fall, perhaps like no other season, is a time to remember, reminisce and recollect. It is time to take inventory and reap the rewards of all we have sown.

Your legacy is the sum of your hopes, aspirations and investments in your loved ones and the causes important to you. Make sure your legacy reflects your life appropriately.

This season is the perfect time to visit your attorney and make your memories part of your future. A plan does not need to be complicated. Consider the following and how simply they can be part of your plan.

TOOLS FOR YOU	WHAT IT DOES FOR YOU	HOW WE CAN HELP
Will (or estate plan)	Lays out your wishes for family, friends and important causes	Our free estate planning guide makes it easy and could save attorneys' fees
Charitable gift annuity	Gives you tax benefits and fixed payments for life	We can show you your favorable fixed rate and tax deduction
Beneficiary designation on your IRA, checking or investment account	Takes only a few moments and can be easily changed	We can point you to the forms you need
Real property	You can stay in your house and receive an income tax deduction this year	We can give you details on a life estate

HERE ARE SOME IDEAS
TO GET YOU STARTED:

IF YOU HAVE THIS NOW...	CONSIDER THIS FOR YOUR LEGACY...
CD with your bank or credit union	A charitable gift annuity with favorable fixed rates
A home worth more than you paid for it	A life estate that lets you live in the property but gives you tax benefits now
Financial accounts	A payable on death designation to direct where you want this account to go
Highly appreciated stock	A charitable remainder trust to liquidate the stock in tax-favored ways

