

# YOUR TRAVEL PARTNER



When you invite us to help you plan your life's road trip, you can reach the destination you desire, while also crafting the legacy that reflects a life well-lived.

You can customize everything to fit your needs and desires. We can map a journey where every day is a holiday. You can live happily knowing you helped others while also saving taxes, and possibly creating new income streams for yourself. Call, click or email us and we can help you get started.

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.

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## 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.



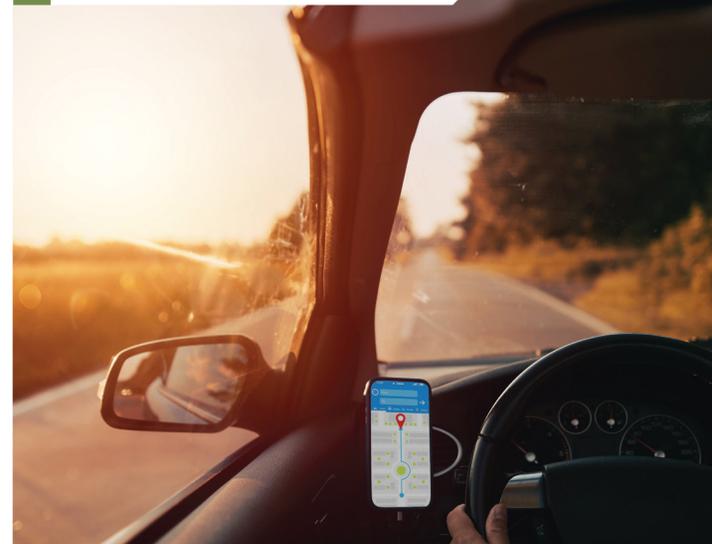
**Desert Southwest**  
UNITED METHODIST FOUNDATION

602.798.8202 | [www.dsumf.org](http://www.dsumf.org)

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# ROAD TRIP

## PLAN FOR YOUR LIFE'S JOURNEY



We have tools and ideas to save you money while providing for the people and causes important to you.



**Desert Southwest**

UNITED METHODIST  
FOUNDATION



# IT'S TIME FOR A ROAD TRIP

WE CAN HELP MAKE YOUR LIFE BETTER AND THE JOURNEY MORE ENJOYABLE.

We can explore new places and expose ourselves to fresh experiences. Each community, city and state promise new adventures to expand our horizons and fill us with new ideas. Before you depart, consider bringing us along for the journey.

We can guide you to some new ideas that will help make your life, your trip and your memories better and sweeter. As we take in new territories on our road trip, we will discover wonderful places, people and ideas right there before us.

WE ARE HERE TO HELP YOU PLAN A BETTER FUTURE FOR YOU AND FOR OTHERS.

**TWO BENEFITS IN ONE** — With our charitable gift annuity, you can experience two benefits: fixed payments for life and significant tax benefits. Ask us how a gift annuity is the perfect destination for multiple benefits.

**SMART VIEW** — A charitable remainder trust will give you a mountaintop experience. When you see how it can take stocks you have held for a while and convert them to payments to you, with capital gains and income tax benefits, you will want to visit this destination right away.

**CAREFREE LIVING** — You will find life's cares melt away when you consider writing your will or updating your estate plans. With your plans in place, every day and every trip is a holiday.

Each of the above destinations offer its own unique features and benefits. Visit them all or choose one that works best for you.

Below is our handy travel guide to help you plan the trip that is best for you:



Features	TRAVELER RATING		
	Charitable Gift Annuity	Charitable Remainder Unitrust	Updated Will or Estate Plan
Payments to you or you and your spouse for life	●●●●●	●●●●●	●●●●●
Lower capital gains taxes	●●●●●	●●●●●	●●●●●
Can be completed in 30 minutes or less	●●●●●	●●●●●	●●●●●
Can lower estate taxes	●●●●●	●●●●●	●●●●●

## LIFE IS A HOLIDAY

You can live every day like you are on a holiday

With a little planning, you can visit new places that will enrich your life and give you great memories along the way. In addition to the three popular destinations above, we can tell you about some other hidden gems that, while off the beaten path, are worth considering.

Life insurance, for example, allows you to amplify a few dollars into many more while joining us in our mission. A payable on death form for your bank account, investment account or retirement account is a quick trip, taking only a few moments. These planning tools offer breathtaking simplicity, while leaving a legacy for you that would make the Grand Canyon seem small.