

Stewardship
WELL DONE

FMF *Financial*
SERVICES

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www.fmgiftplan.org

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What is planned giving?
How can it benefit you?

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DISCOVER PLANNED GIVING

Planned giving is a way to integrate your personal, financial and estate planning goals. The right planned gift may provide you with tax and income benefits while helping further the mission of various Free Methodist ministries. Here are some of the most common planned gifts you can make:

BEQUEST

Your Will or Revocable Living Trust may include a gift of a specific asset, a dollar amount or a percentage of your estate to ministry.

CHARITABLE GIFT ANNUITIES AND CHARITABLE REMAINDER TRUSTS

These plans can provide you with lifetime income, a charitable income tax deduction and leave a nice gift to ministry. If you own appreciated assets such as stock or real estate, we can help you sell those assets tax free.

LIFE ESTATE

You can make a tax deductible gift of your home and remain living in it for your lifetime. There are additional real estate sale strategies that can provide you with cash, a charitable deduction and even income.

There are many ways you may benefit from planned giving. Contact us or visit our website today, so we may assist you in discovering the right plan for you.

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Planned giving is a way for you to make a gift to your favorite charitable causes, including Free Methodist ministries. The right planned gift can provide you and your loved ones with tax and income benefits. There are many reasons why a planned gift might make sense for you this year.

Are you looking for a way to avoid capital gains tax on the sale of your home or investments?

Are you thinking about how to build your income for retirement?

Would you like to create an inheritance for your children and also help ministry?

Do you need a tax-efficient way to sell your business this year?

Would you like to receive high fixed payments for life and even some tax-free income?

If you answered yes to any of these questions, a planned gift can help you achieve your goals. To learn more about the benefits of planned giving, please contact us to begin the conversation.

