



Giving Through a Will, Living Trust and Other Plans

In addition to filling an important role in providing for the future financial security of your family and others, your will or living trust can offer a way to make a thoughtful gift to the Foundation as part of your long-range estate and financial plans.

A gift made through a will or living trust can be convenient to arrange. A simple provision or amendment prepared by your attorney at the time you make or update your will or trust is all that is necessary. Gifts included in wills and living trusts are popular because they are flexible, easy to arrange, and may be changed with your life circumstances.

Ways to Give Through Wills and Trusts

- Make a gift of a specific amount. A gift of a particular amount may be designated for general use or to fund a special need or program of your choice.
- Provide for a gift of particular property. Real estate (your personal residence or other property), stocks and other items of value are examples of assets that can be used to fund bequests to the Foundation.
- Designate a percentage of your estate to the Foundation through your will or living trust.
- Give the remainder, or residue, of your estate— —that is, what remains after other bequests to friends and loved ones are satisfied.

There is no limit on amounts deductible from federal gift and estate tax for gifts made by will or trust. There will be no tax due on assets given in this way. To plan a charitable bequest, inform your attorney of your wishes and ask for advice regarding tax considerations and the best form for your gift. If you decide to include a gift to the Foundation in your estate plans, the Foundation's legal name and tax ID number are:

Legal Name: Arborlawn United Methodist Church Foundation, Inc.

Tax ID: 75-2357350 Ask your advisors or contact us if you are interested in making a gift through your will or a trust.