

Charitable Bequests

Planned Giving

Leave Your Legacy

**Easy to do — A simple
one-page application**

Minimum of \$1,000

**Can be established for one or
two lives**

**Rates based on annuitant(s)
age to nearest birthday**

**Provides quarterly payments
for life**

**Annuity payments can be
made by direct deposit or
check**

**Current year charitable
income deduction available**

**A unique way to bless others
now and in the future**

A creative opportunity for you

To encourage charitable gifts, there are various provisions within the Internal Revenue Code that allows for tax benefits to generous donors. One such approved plan exists for those who transfer money or securities in exchange for the agreement to pay the annuitant (and a survivor annuitant, if desired) a fixed annuity for life.

A Charitable Gift Annuity pays a guaranteed annuity for life with no investment worries or responsibilities.

There is an attractive payout rate (*e.g. 4.7 percent for a single annuitant age 65 or 9.0 percent for someone age 90*) and the donor has the additional reward of making a meaningful charitable gift now.

With a minimum gift of \$1,000 a donor can decide which Shawnee United Methodist Church fund will ultimately receive the remainder of the gift. It is an efficient process with a one-page application, which takes a few minutes to complete and can be accomplished via mail or with a Shawnee UMC Legacy Team Member.

Quarterly calendar payments are calculated by age of the annuitant(s) and the amount of the gift. Payments begin promptly with the next quarterly cycle. It's beneficial to know giving through the Charitable Gift Annuity allows the opportunity to give today and on into the future.

**Through giving,
blessings will occur
with the knowledge
that a decision
today will have an
impact long into
the future.**



shawnee
UNITED METHODIST CHURCH

2600 Zurmehly Road
Lima, OH 45806
419.991.4806

*Please contact the church if
you have questions. Ask for
the Legacy Giving Team.*

www.ShawneeUMC.com