

Leaving your Legacy: Options for Individuals

Protecting our Legacy: Options for Churches

Support Your Church's Mission:

- *Endowment*- start an endowment for your church or add to an existing fund through any of the following ways:
- *Charitable IRA Rollover*- required distributions may be directed to your church and not be included as taxable income.
- *Stock Gifts*- opportunity to avoid capital gains taxes if you own stocks or bonds that have increased in value.
- *Charitable Gift Annuity, Charitable Remainder Unitrust, Charitable Lead Trust, Real Estate, Life Insurance, Donor Advised Funds*
- *One-time gift* during your lifetime or through your will/estate

Building Fund Trust Certificates:

- Similar to Certificates of Deposit (CDs) offered by your bank, usually at better rates.
- Offered for 1, 3 and 5 year terms. You can reinvest earnings or receive an annual payout. Minimum investment amount of \$1,000.

Scholarships:

- Encourage the students in your life to apply! Open December 1—March 1 annually.
- Set up your own scholarship fund. You can give preference to students in your county or even your congregation.

HELP Loans:

- Refinance your seminary loan debt at a LOW interest rate!

Estate Planning:

- We partner with *Thompson & Associates* to offer complimentary & confidential sessions with an estate planning expert.

Investment Funds:

- Balanced Fund
- Bond Fund
- Equity Fund
- Short-term Income Fund

We will work with you to determine which fund(s) will be best for your church based on your goals. Earnings can be reinvested or distributed. All investments are made in accordance with the Social Principles of the UMC. Ask us about our LOW fees!

Building Fund Trust Certificates:

- Same as certificates offered to individuals. Money invested in certificates is available to loan to churches for capital projects.

Building Fund Trust Loans:

- Starting as low as \$5,000, we offer loans for a variety of projects including repairs, renovations, new construction and technology upgrades.

Workshops:

- Training is offered on a range of topics including starting an endowment, rejuvenating an endowment, encouraging bequests, personal finances (with an emphasis on pastors) and estate planning. Most training is FREE depending on how many sessions are needed.

Grants:

- The Carma Mohler Grant is awarded once per year to Methodist-affiliated groups working to alleviate hunger in Iowa. Applications accepted July 1—October 1 annually.
- If your church or a member is passionate about a specific cause, we can help set up a fund and establish a grant for that cause.

Don't see what you're looking for on this list?

We are here to help your church and you accomplish your missional goals, whatever they are! We have helped investors with passions ranging from sending kids to bible camp to fighting hunger across Iowa—you name it and we will help you with it!

