



# SHARE

*Your Message*



# DESIGN

*Your Gift*



# LEARN

*What Planned Giving Really Is*

*As you plan your gift, please know that planned giving is far more than a transaction, it is...*

**OPPORTUNITY...** for you who care so deeply for this church and want to continue energizing this mission and its ministries, even after your lifetime.

**THE GIFT OF OUR LIFETIME...** for you who are using your assets fully today – like your financial, personal and real assets. After our lifetime, when we pass along those assets remaining, most of us have the opportunity to make the largest and therefore the most impactful gift of our lives.

**LEADERSHIP...** for you, whose generous decisions and actions have been witnessed by others. Your planned gift teaches others to re-deploy the resources they have to lift up others during their lifetimes and after.



# DESIGN *Your Gift*

*Your financial picture is unique... and so is your planned gift*

Planning your gift may enable you to send more to ministry or to protect more future value for you and your family. Here are some of the more common gifts that you might consider:

**BEQUEST:** Make a gift after your lifetime through your will or trust. This can be a fixed dollar amount, a specific asset, or a percentage of your estate.

**RETIREMENT ACCOUNT:** This can be the most heavily taxed asset in many estates. Choosing this as your gift might leave your less task-burdened assets to your loved ones.

**CHARITABLE TRUST:** Trusts can combine flexible benefits including a generous income, tax benefits and a powerful gift to the church.

**OTHER:** Many other giving opportunities might prove ideal for your situation.

## ACTION

*Caring for estates and assets often requires help*

In order to make sure a particular planned gift fits your situation; we suggest that you **consult with your professional advisor** on how this gift would fit into your plans.



# SHARE

*Your Message*

*Maximize the power of your gift. Letting people know you made a gift, and why, amplifies the power of your gift. We teach by demonstrating our values through our words and actions. Now that you have made a gift, you may expand your impact by sharing with loved ones the why of your gift.*

*Share the news of your gift with:*

**YOUR LOVED ONES** so that they can witness your commitment beyond your lifetime — and follow your example to plan their own legacy for the future.

**FIRST PRESBYTERIAN CHURCH** so that others may witness your joy and explore their own pathway to such a gift.

**THE LEGACY SOCIETY** so that we may thank you properly and ensure your future intentions are honored.

## *Join the* Legacy Society

**ACTION**

The Legacy Society was established to recognize individuals or families who have named First Presbyterian Church Endowment as a beneficiary in their will, trust life insurance policy or other estate-related gift plan. These generous gifts ensure a bright future for First Presbyterian Church.

A legacy gift honors the act of giving to God. First Presbyterian Church recognizes and thanks members and friends who have made a commitment in their estate plan to provide enduring support for our Church and its service to future generations.

GIFT

I/we wish to provide a planned gift of support. I/We have made a provision for a gift to First Presbyterian Church, from my/our estate plans. It is my/our intention to leave a planned gift to First Presbyterian Church through my/our:

- Will or Trust
- Charitable Remainder Trust
- Life Insurance Policy

PREFERENCE

I/We would like to inform First Presbyterian Church, for long-term planning purposes only, that, as of this date, the value of my/our gift is \$\_\_\_\_\_  exactly  approximately or  \_\_\_\_\_ percentage of my/our estate. I/We understand that, by stating an amount, my/our estate is not legally bound by this statement and at any time I/we may choose to add, subtract, or revoke First Presbyterian Church, as beneficiary of this planned gift. First Presbyterian Church greatly appreciates notification in the event that you make a change or adjustment to this gift. I/We would like for my/our planned gift to be:

- LEGACY FUND: Funds will be used at the discretion of the Session to meet both challenges and opportunities presented to our church. Since we do not know what or when these may be, we will be guided by the Spirit of God and good stewardship to answer these needs
- MISSION: Funds will be used for both local and non-local mission needs. Some examples of mission needs are: local food and shelter, natural disaster, medical, youth and adult mission trips, etc.
- LIFE OF THE CHURCH: Funds will be used for Family Ministry, Children, Youth, Worship & Music Ministry programs and needs
- FACILITES PRESERVATION & IMPROVEMENT: Funds will be used for both the preservation and expansion of current or new facilities and technology.
- EDUCATION & SCHOLARSHIP: Funds will be used for preschool, higher education & theological scholarships

Please enroll me/us in The Legacy Society, a way for First Presbyterian Church to express appreciation for bequests and planned gifts:

- You may publish my/our name(s) as a member(s).
- or*
- Please consider this to be an anonymous gift.

MY INFORMATION

\_\_\_\_\_  
*Signature(s)*


\_\_\_\_\_  
*Name(s)*

\_\_\_\_\_  
*Address, City, State, Zip*

\_\_\_\_\_  
*Phone # or E-mail*

\_\_\_\_\_  
*Date*

Personal Representative /  
Executor:



You have  
heard the call.  
And you've  
answered.

*What moved you? Your words matter here.*

Through your gift, you are lifting future generations on your shoulders to thrive in ministry. There are others like you; would you help us inspire them?

When you share your *why*, your words may help someone like you envision that joy for giving.

**WHY I GIVE:**

---

---

---

---

**WHY I GIVE HERE:**

---

---

---

---

**I HOPE THAT MY GIFT:**

---

---

---

---