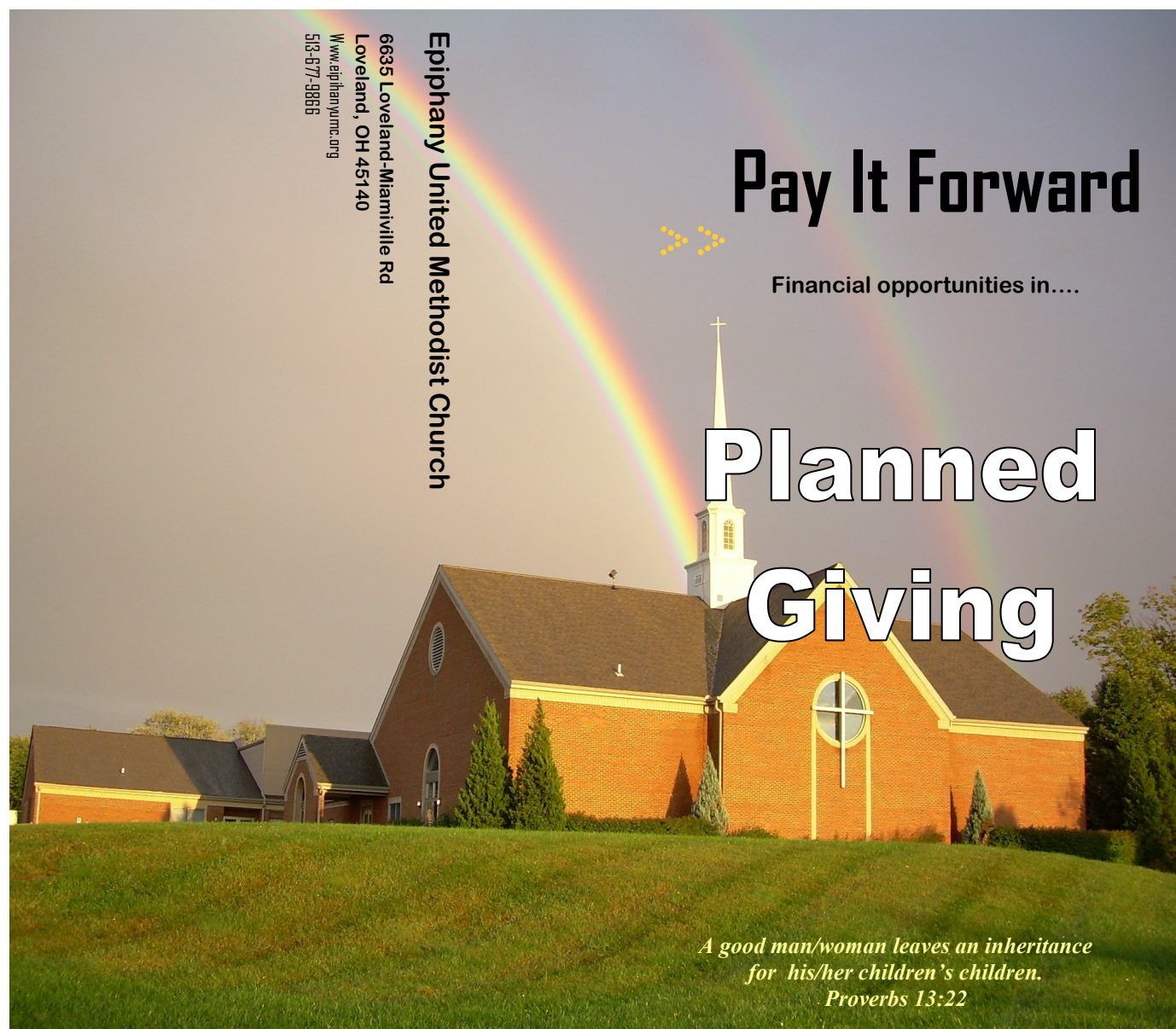


Epiphany United Methodist Church is a 501©(3) non-profit, tax-exempt, religious organization as determined by the Internal Revenue Service and by the laws of the State of Ohio. The Planned Giving Team, Finance Team, Facilities Team or the Church Staff are not engaged in rendering legal or tax advisory services. For advice and assistance in gifting, please consult the advice of an attorney or other professional financial advisor. The purpose of the publication is to provide general information about Epiphany's Endowment Fund. State laws will govern all activity. Federal estate tax, state income/estate taxes or state law may impact your results.

Phone: 513-677-9866  
Fax: 513-677-8198  
Email: [epiphanyumc@fuse.net](mailto:epiphanyumc@fuse.net)  
Web: [www.EpiphanyUMC.org](http://www.EpiphanyUMC.org)



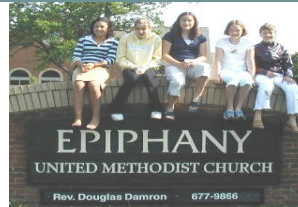
**Epiphany United Methodist Church**  
6635 Loveland-Miamiville Rd  
Loveland, OH 45140  
[www.epiphanyumc.org](http://www.epiphanyumc.org)  
513-677-9866

# Pay It Forward

Financial opportunities in....

# Planned Giving

*A good man/woman leaves an inheritance  
for his/her children's children.  
Proverbs 13:22*



## Planned Giving Opportunities...

There are several ways you can leave a legacy to the Epiphany United Methodist Church Endowment Fund, while at the same time providing yourself and your family with significant tax and financial benefits. In addition to outright, tax-deductible cash gifts, there are other creative ways to give a long-term gift, either during life, or as part of an estate plan, including:

- A bequest in your Will
- Revocable Living Trust
- Life Insurance Beneficiary Designation
- Gifts of Stock or Bonds
- 401(k) plan or IRA Designation
- Real Estate Gifts
- Retirement Plan Assets
- Annuities

We hope you will consider a Planned Giving gift to Epiphany. This type of gift offers these main benefits:

- **Simplicity.** Just a few sentences in your will or trust is needed.
- **Flexibility.** You can change your mind at any time.
- **Versatility.** You can structure the bequest to your specific gift...using a percentage, giving a specific item or amount of money
- **Tax Relief.** Your estate is entitled to an estate tax\* charitable deduction for the gift's full value.

## Epiphany Endowment Funds

The Epiphany Endowment Fund allows the interest generated from the principal donation to be used to provide supplemental funds, above and beyond current giving, enabling Epiphany United Methodist Church to fund new ministries and reach new disciples for Christ well beyond our current budget. The Epiphany Endowment Fund consists of three separate funds: General Fund, Building Fund and Mission Fund. Funds can be designated for any of the three, as suggested below:

### The General Fund

I give the sum of \$ \_\_\_ (or \_\_\_% of my estate, or specifically described property, or the remainder of my estate/trust) to the General Fund of the Epiphany UMC Endowment Fund. The distributions from the General Fund shall be distributed over a relatively short number of years for the exclusive use of the church, as set forth in the Endowment provisions.

### The Building Fund

I give the sum of \$ \_\_\_ (or \_\_\_% of my estate, or specifically described property, or the remainder of my estate/trust) to the Building Fund of the Epiphany UMC Endowment Fund. The distributions from this Fund shall be devoted to the operation, maintenance, preservation and protection of the church's real estate and tangible property, as set forth in the Endowment resolution.

### The Mission Fund

I give the sum of \$ \_\_\_ (or \_\_\_% of my estate, or specifically described property, or the remainder of my estate/trust) to the Mission Fund of the Epiphany UMC Endowment Fund. The Mission Fund provides money for missions in and beyond the church and local community.

### Undesignated Gifts

I give the sum of \$ \_\_\_ (or \_\_\_% of my estate, or specifically described property, or the remainder of my estate/trust) to the Endowment Fund of the Epiphany United Methodist Church.

## Find More Information

### Learn More About Planned Giving and Epiphany's Endowment Fund

Please provide me with more information:

Suggested bequest language

Gifts of securities

Gifts of life insurance

Gifts from retirement plans

Gifts of real estate

Please have someone call me to discuss gift opportunities.

I have already included Epiphany in my estate plan through:  my will  trust agreement  Insurance policy  other

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone Number \_\_\_\_\_

Email \_\_\_\_\_

Please return to the church office, drop it in the offering plate, or email the church at [epiphanyumc@fuse.net](mailto:epiphanyumc@fuse.net).

Please contact your attorney, professional financial planner or tax advisor for the best charitable giving methods available for you. Or, you may also contact the Planned Giving Team at Epiphany United Methodist Church at 513-677-9866.

\*Federal Estate Taxes and IRS Rules and Regulations may change from year-to-year. Please check for final legislation before making any financial decisions.