5 Easy Ways

to Make a Planned Gift

1 Beneficiary Designation of an IRA, 401(k), or Retirement Plan

• Adding Resurrection as a partial or full beneficiary of your retirement account is easy, flexible, and revocable. Beneficiary forms can be accessed and completed online and in minutes through most financial institutions and IRA custodians. You can also contact your insurance representative to make this change.

• After your lifetime, your gift is made immediately to Resurrection to help us continue the important work in the community that means so much to you.

2 Beneficiary Designation of a Life Insurance Policy or HSA

• Adding Resurrection as a primary or secondary beneficiary for your life insurance policy is easy! Your designation can be adjusted or changed by you at any time.

• Younger, employed individuals can also name Resurrection as a beneficiary of their Group Term Life Insurance Policy, 401(k), or HSA Account at their place of work.

• If you have a "paid up" life insurance policy that you no longer need, you can transfer the ownership of the policy directly to Resurrection. In return, you receive a generous income tax deduction for your gift!

3 Payable on Death Designation for Bank and brokerage Accounts, Certificates of Deposit, or Real Estate

• Payable on Death (POD), or Transfer on Death, designations can be created easily to distribute a bank account, certificate of deposit, or brokerage account after your lifetime.

• Your residence, vacation home, or other real estate can also utilize a POD designation to be transferred after your lifetime. A simple one-page deed is prepared and filed in the County where the property is located.

• These POD designations are simple, flexible, and revocable at any time!

4 Simple Bequest through a Codicil or Amendment

• A new bequest through your will or trust, is as simple as having a short 1 ½ page codicil or amendment prepared by an attorney. Your full estate plan should not need to be rewritten to make this special gift provision.

• Your charitable gift can be a specific amount, a percentage of your estate, or a "remainder" interest in your estate, after distributions to your other heirs are made.

• By leaving your legacy, you join the generational impact of the church's mission and ministry in the world.

To share your gift intentions visit:

resurrection.church/foundation

5 Gifts of Appreciated Securities

• A gift of appreciated securities, such as a stock or mutual fund, is a great way to support Resurrection through your generosity.

• You receive an income tax deduction based on the full "market value" of the stock, up to 30% of your adjusted gross income.

• The "cost" of making your gift is the price you paid for the stock, which is less than the full gift amount if made by a gift of cash or check.

For the Lord is good; his steadfast love endures forever and his faithfulness to all generations.

Psalm 100:5

Resurrection
A UNITED METHODIST CHURCH
FOUNDATION