



Planned Giving

is about being intentional in how you make gifts to your church.

It is for anyone who has more than a checking account and credit card.

It is about using assets that you already have so that your gifts may provide a greater impact.

It is about saving money on taxes so that you can give more than you thought you could.

And, it is about leaving a legacy to your church family so that your heirs may know and experience God's love.

"Since you excel in everything - in faith, in speech, in knowledge, in complete earnestness and the love we have kindled in you - see that you also excel in this grace of giving."
2 Corinthians 8:8-9 NIV

HOW CAN WE HELP YOU?

Planned Giving Tools

We provide tax-wise giving strategies, legal resources, and gift calculators.

We maintain a comprehensive database of current tax-laws to help you.

Bequest Language

We have language to give to your attorney for charitable bequests in your will, trust, or codicil to a will.

Charitable Gift Annuities

Backed by the Assets of the Methodists Helping Methodists Foundation
Find calculation tools on our website

Charitable Trust Management

Endowments, CRUTs, Scholarships
Trust management services
Low or No Fees

Stock Donations

We have a special brokerage account in place for this purpose.

IRA Charitable Rollovers

Call your custodian or manager directly.
If you are unsure, give us a call.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your financial advisor for information specific to your situation.



Methodists Helping Methodists

FOUNDATION

CONTACT US TO LEARN MORE

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PLANNED GIVING GUIDE



Win-Win strategies
Up your giving game
Lower your tax bill

mhmf.org

Your Gift	Your Goal	How It Works	Your Benefits
IRA Charitable Rollover	<ul style="list-style-type: none"> • Satisfy Required Minimum Distribution (RMD) of IRA • Receive a tax benefit 	You instruct your IRA administrator to send a distribution directly to your church. You must be 70 1/2 years old and may give up to \$100,000.	<ul style="list-style-type: none"> • Satisfy your annual RMD • Pay no income tax on the amount you transferred
Donate Appreciated Stocks & Securities	<ul style="list-style-type: none"> • Avoid Capital Gains Tax • Receive a charitable deduction 	You donate appreciated securities directly to Methodists Helping Methodists Foundation. We will sell stocks upon receipt and send the proceeds to your church.	<ul style="list-style-type: none"> • You pay no capital gains on the securities donated. • You may report the full value of the donation on your itemized return.
Bequest	<ul style="list-style-type: none"> • Maintain control of your assets throughout your life • Make a charitable gift upon your death 	You designate your church and/or the Mountain Sky United Methodist Foundation as the beneficiary of your assets by will, trust, or other instrument.	<ul style="list-style-type: none"> • Estate tax charitable deduction • Life use and ownership of your property
Charitable Gift Annuity	<ul style="list-style-type: none"> • Receive fixed income for life • Avoid capital gains tax on the sale of your appreciated property • Enjoy the benefit of tax savings from a charitable deduction 	You transfer cash or appreciated property to the Methodists Helping Methodists Foundation in exchange for our promise (written contract) to pay you fixed income for the rest of your life.	<ul style="list-style-type: none"> • Charitable tax deduction • Fixed income for life • Partial bypass of capital gain • Possible tax-free payments • YOUR CHURCH is the designated beneficiary
Charitable Remainder Trust (CRT)	<ul style="list-style-type: none"> • Transfer your appreciated property without paying capital gains tax • Enjoy regular income for life or a specified term of years • Receive tax savings from charitable deduction 	You transfer your cash or property to Methodists Helping Methodists Foundation to establish a charitable trust. You receive income. At maturity, your church or United Methodist organization receives the remainder.	<ul style="list-style-type: none"> • Charitable tax deduction • Income for life or a term of years • Possible income growth over time • Avoidance of capital gains tax
Charitable Lead Trust (CLT)	<ul style="list-style-type: none"> • Give cash or property to your family in the future • Avoid substantial gift or estate tax 	You transfer your cash or property to fund a lead trust that makes a gift to your church or Methodists Helping Methodists Foundation for a number of years. You receive a charitable tax deduction for the gift. Your family receives the remainder at substantial tax savings.	<ul style="list-style-type: none"> • Gift or estate tax deduction • Asset and appreciation passes to family at a reduced cost
Life Estate Reserved	<ul style="list-style-type: none"> • Remain in your home for life • Receive a charitable income tax deduction 	You give your property to your church or the Methodists Helping Methodists Foundation and retain the right to use the property during your life.	<ul style="list-style-type: none"> • Charitable tax deduction • Lifetime use of property
Bargain Sale	<ul style="list-style-type: none"> • Transfer your property • Receive cash or debt relief without paying substantial taxes 	We purchase your property for less than fair market value. You receive the cash and a charitable deduction for the difference between the market value and purchase price.	<ul style="list-style-type: none"> • Cash from sale • Charitable tax deduction • Partial bypass of capital gains



Bonnie was 81 and a retired city employee. She wanted to find a way to supplement her pension with a secure source of income. Judy also volunteered with her church. She wished to make a gift before the end of the year. She owned stock that was producing a very low return in the market. By transferring this stock to the Methodists Helping Methodists Foundation to fund a Charitable Gift Annuity, Judy began receiving substantial fixed income for life at a rate based on her age. She also received a charitable deduction this year. This reduced her federal tax bill. She lives in Montana and she received a state tax credit because her gift will leave a legacy to a qualified endowment.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.