



Planning Today TO LEAVE A LEGACY TOMORROW

Would you like to
leave a legacy that
will endure for
generations to come?

Are you ready to
invest your resources
into a brighter future
for older adults?

Would you like
to help create
meaningful
connections and
abundant living for
seniors but you're not
sure how to
get started?

The legacy of UMC is one of abundant living and rich connections. Since 1985, the UMC Foundation has enhanced the lives of residents through the generous donations of our sponsors. **Because of your support, no senior has ever been asked to leave our care due to their inability to pay.** We ensure that seniors enjoy peace of mind and experience abundant living for as long as they call our community home. We're committed to our calling of providing lasting security for seniors so that they are free to flourish.

It wouldn't be possible to fulfill our mission without the generosity of sponsors like you, and because of the flexibility of our giving options, supporting our mission has never been simpler. Legacy gifts are popular when it comes to giving, and the **best part is that you don't need to be wealthy to make use of these planned giving vehicles or leave less of your resources for your loved ones in your will.** You can remember the UMC Foundation in your legacy planning by utilizing smart, tax-efficient strategies that make the most of what you're willing or able to give.

Our seniors benefit from your generosity whether your contribution to our mission is big or small, and gifts of all sizes matter! Every dollar makes a difference in the lives of seniors here and enables them to continue living in joy, community, and abundance.



UMC FOUNDATION
Abundant Life for Seniors

WAYS TO GIVE

■ A bequest in your will (*in the form of property, stocks, cash, or a portion of your estate*)

Remembering the UMC Foundation in your will provides you with flexibility. Through stocks, cash, a portion of your estate, or a form of property, you can contribute to our mission through the means most applicable to your financial situation. Every legacy gift included in a will directly supports seniors relying on the financial aid that the Foundation provides.

■ Charitable Gift Annuity (CGA)

A CGA not only benefits the Foundation. It also provides you with a fixed stream of income for life in exchange for a sizeable donation. That donation can include securities, cash, or other assets. By contributing via a CGA, you may be eligible to claim partial charitable tax deduction for the year in which the annuity was established.

■ Making a gift of life insurance

The UMC Foundation can be the beneficiary of your life insurance policy, if you opt for this charitable giving vehicle. Through the donation of a life insurance policy, the Foundation ultimately receives a larger gift than it would otherwise, and if you transfer policy ownership prior to your death, there's an option for the policy to be surrendered for cash.

■ Designate the Foundation as a beneficiary in your retirement fund

Naming the UMC Foundation as a beneficiary in your retirement fund could have considerable tax benefits. You may find that due to your savings or your circumstances, you may not need all of the funds in your retirement account, which means you could use the opportunity to bless the seniors in our care. Retirement accounts like 401(k)s or IRAs can be included in estate planning, and when a charity is named as the beneficiary, it can have significant tax benefits for you!

■ Charitable Remainder Trust

Charitable remainder trusts allow you to donate your assets to the Foundation while collecting a potential annual income for an allotted time. This giving option may make you eligible for partial tax deductions, and they're an ideal way to contribute to the abundant lives of seniors while ensuring a source of income for you as well.

■ A Donor Advised Fund (DAF)

DAFs have skyrocketed in popularity over the last few years due to their simplicity, flexibility, and the possible tax deductions associated with them. You can donate stocks, cash, cryptocurrency, and other assets to these funds and the potential for account growth means more dollars to contribute to the Foundation's mission. A DAF is an excellent option if you desire to support the Foundation but are particularly interested in donating non-cash assets and maintaining a level of control over the fund.



Planned giving provides you with options beyond writing a check and allows you to explore the most tax-wise strategy to support the Foundation.

We rely on generous donors like you to maintain our commitment to providing excellence in care, compassion, and connection for the seniors that we serve. Thank you for your partnership in our mission! Your support ensures that seniors never need to worry about the future and instead, they can focus on enjoying abundant living at one of our many communities.

When you remember the Foundation in your planned giving, you are taking part in building a lasting legacy of hope. You become more than just a part of our mission – you become a part of our calling.

Giving to the UMC Foundation means putting your money where your heart is and playing an integral role in providing peace of mind and security for our residents and their families as well!



NEXT STEPS

To continue your conversation with Gary Engelstad, Director of Transformational Giving, reach out at 732-236-9884 or email GEngelstad@Umcommunities.org.

SHARING YOUR INTENTIONS

When you make your bequest or gift intentions known and decide to partner with us in our life-changing mission, UMC can continue to thrive! Even if you wish to remain anonymous – which is always an option – knowing in advance that you desire to give to the Foundation helps us plan more effectively for the future.



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