



UNITED METHODIST
FOUNDATION
ALABAMA • WEST FLORIDA

The Alabama - West Florida United Methodist Foundation (ALWFUMF)

Our mission is to encourage generosity as a way of life, foster planned giving, develop successful endowment programs, and manage funds in order to strengthen the work of Christ's church. Our AWF Development Fund also supports church growth by providing loan services for building, renovating, or purchasing property.

Our purpose is to help individuals and the church by encouraging generosity through education, consulting, development, and financial services.

Services

AWF Development Fund Services:

- Loans (3.5%)
- Deposit Accounts for individuals and churches (1.0%)

Foundation Services:

- Generosity Development/Workshops
- Consulting
- Fund Administration
- Investment Services
- Church Endowment Programs
- Digital and Printable Resources
- Quarterly Newsletters
- Monthly Eblasts
- Weekly Facebook Resources

UNITED METHODIST
DEVELOPMENT
FUND

ALABAMA • WEST FLORIDA

Generosity Matters

"Giving, not getting, is the way. Generosity begets generosity." Luke 6:38 (MSG)

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UNITED METHODIST FOUNDATION | FALL 2017

Tax Benefits of Year-End Giving



With the December 31 deadline for tax-deductible gifts in sight, now is the perfect time to think about making charitable gifts. Giving at the end of the year can be an opportunity to tithe from a work bonus, catch up on giving for the year, bless others, and benefit from attractive tax deductions. These gifts provide the opportunity for you to **make a difference in others lives, show generosity, and support a need within your church or community.**

Once you think of a charitable cause, determining what to give, and what makes the best type of gift, is the next step. You might want to consider one-time gifts, legacy gifts, and the tax ramifications for your gift. **Choosing a gift that best fits both your needs and the needs of the organization doesn't have to be difficult;** we have outlined some of the most popular ways to give, and their benefits, on page 3.

Ways to Give

A one-time gift of cash, stocks, bonds, real estate, or personal property can offer immediate tax deductions while charitable gift annuities offer deductions over a longer period.

Charitable gifts of stocks and bonds*, real estate, and personal property can be given at any time. When donating these gifts, an immediate tax deduction is available for the market value of the asset(s), which gives you the opportunity to see your gift working now to help the current needs of the church.

If you are looking to make a gift that will provide you with current or future revenue, you may want to consider a charitable gift annuity or charitable remainder unitrust. These types of gifts will provide you with revenue for life, and the remainder will transfer to the church at the time of your passing.

If you would like to speak with one of our professionals about what type of gift will benefit you and your church the most, call us at 334-793-6820 or email us at foundation@alwfumf.org. We will be happy to assist you through the gift planning process.

*Before gifting stocks and bonds, please complete and send in the Security Transfer Form (alwfumf.org/resources) to P.O. Box 8066, Dothan, AL 36304.

Promote Generosity With Our New Brochures!

CHARITABLE GIFT ANNUITY | WILLS AND ESTATE PLANNING

Request digital brochures by emailing us at foundation@alwfumf.org

Plan a Successful Year-End Giving Campaign



Throughout the year the church raises funds for a variety of different ministries and outreaches. As fall begins, many churches start to plan and implement a strategy for one last giving campaign before the end of the year.

A year-end giving campaign can be a great way to encourage generosity the last couple months of the year, and it can be a benefit to those looking for tax-deductible donations before tax season.

Typically churches focus on a single year-end giving campaign to support a need either within the church walls or in the community. With Thanksgiving and Christmas on the horizon, it is the perfect time to begin a giving campaign. **It can be a good reminder to examine and reflect on reasons we are generous, as well as look for opportunities to give, during a season marked by generosity.**

It's not too late to start promoting generosity this year. Follow these guidelines for a smooth and successful year-end giving campaign.

Step 1

Start with a clear goal. Brainstorm giving ideas with your team to determine what the campaign will support: a new building project, the children's ministry, an outreach ministry like the food pantry, a local homeless shelter, etc.

Step 2

Raise awareness for your campaign. Start sending emails and letters, posting on social media, making announcements during services, and planning generosity sermons that include the current need and how the congregation can help solve this issue. Be sure it is well known where people can go to give to this campaign.

Step 3

Be consistent with your messaging. Throughout November and December, be sure you are delivering consistent information and announcements about your campaign. Share stories from people who are already giving, how to give, ways people can get involved, the lives that will be changed and impacted if you reach your goal, and how your leadership is involved in giving.

Step 4

After the campaign is over, don't miss the opportunity to thank your donors and celebrate your success, even if you didn't reach your goal. Remind the congregation how their gifts will impact the church or community, and when they can expect to start seeing results. During the next couple of weeks after its conclusion, keep the church updated with the campaign.

If you are looking to get the most out of your year-end giving campaign, see the **"Year-End Giving: Playbook"** provided by United Methodist Communications. This resource gives a detailed plan from start to finish, guiding you through the year-end campaign process. www.umcgiving.org/resource-articles/year-end-giving-playbook



Connect with us

TIPS • TOOLS • RESOURCES

Find us on 
@ALWFUMF



Fall Checklist

- ✓ *Subscribe to Foundation email resources (email foundation@alwfumf.org)*
- ✓ *Like the Foundation Facebook page for weekly tips and resources (facebook.com/alwfumf)*
- ✓ *Make a gift to my favorite United Methodist church or organization*

- ✓ *Subscribe to the Foundation quarterly newsletter (send name and address to foundation@alwfumf.org)*
- ✓ *Request the Wills and Estate Planning Brochure (email foundation@alwfumf.org)*
- ✓ *Share the Foundation newsletter*

Alabama - West Florida United Methodist Foundation Ministries

CHURCH ENDOWMENT PROGRAMS

Endowment programs help facilitate planned giving in the church. We offer a step-by-step service designed to encourage and support future financial needs of the church.

INVESTMENT SERVICES

Our investment services are uniquely created for managing church and agency funds. The Foundation staff assists in developing a custom investment plan for each participating organization or donor.

GENEROSITY DEVELOPMENT/WORKSHOPS

We offer generosity development through educational programs that foster a better understanding of giving and stewardship as both an act of worship and discipleship.

FUND ADMINISTRATION SERVICES

We provide trust fund accounting, regular disbursements, and all other fiduciary administration. This information is reported to you on easy to read statements.

Ways to Give

Outright Gift

- Quick and simple gift
- Donate cash, securities, or personal property
- Income tax deduction and avoid capital gains tax

Bequest in a Will

- Give after your lifetime
- Name your church in your will
- Federal estate tax donation exemption

Charitable Gift Annuity

- Contract to give after your lifetime and receive annual fixed payments now
- Current and future tax exemptions

Donor Advised Fund

- Flexible and allows your input on how funds are used
- Foundation manages assets, and you suggest beneficiaries
- Immediate income tax deduction

Retained Life Estate

- Give a personal residence or farm to your church but continue occupancy for your lifetime
- Charitable income tax deduction

For more giving options, visit alwfumf.org/ways-to-give or email foundation@alwfumf.org

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Printable Newsletter

Be sure to display our newsletter in your church to promote generosity and watch your email for a printable version. To sign up for our digital newsletter, please email foundation@alwfumf.org

Find us on  **ALWFUMF**



Alabama - West Florida United Methodist Foundation

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Giving Tips

It comes as no surprise that giving is at an all-time high during November and December. It is easy to become overwhelmed with donation requests from great organizations, but where is the best place to start? One way to begin the process is by thinking of the things you are most passionate about, then finding an organization that is meeting those needs and goals.

8 Giving Tips

- Set a giving goal and decide how much you want to give ahead of time.
- Save funds throughout the year.
- Search for an organization that matches your passion.
- Research how and what the donation will be used for.
- Earmark your donation for a specific ministry within the church you are particularly passionate about.
- Keep itemized lists of your donations.
- Get a donation receipt.
- Consider donating your time. Most churches and organizations are in need of volunteers and would love your expertise and help.



*Join our email list for more resources to help your church win!
Email foundation@alwfumf.org or scan the QR code on the right.*

