

What is Legacy Giving?

Legacy Giving is a planned endowment fund that promotes the church's mission through the development of a permanent source of income that will be used specifically for new programs or to grow existing programs and services. As the invested dollars in the fund grows, so does the opportunity to provide financial assistance and enhance the mission of St. Andrew's UMC.

Planned gifts provide an opportunity for you to make a difference during your lifetime and beyond. Any gift that can be made to a charitable organization can be made to Legacy Giving, the permanent endowment fund of St. Andrew's UMC.

But I already tithe...

Many at St. Andrew's generously support current giving for Church Operations through gifts & tithes as well as support any on-going Special Needs/Capital Projects. Legacy Giving will primarily be an opportunity to give a last, end of life gift in their memory – a Legacy.

Legacy Giving will also provide a method for honoring family and friends any time through a financial gift. And for some, Legacy Giving will provide a tax advantage opportunity.

"It is not an easy thing to give back to God all that we have received...

This work will require all our wisdom, perseverance, patience, and faithfulness.

Good stewardship requires more than we naturally have within ourselves but not more than we receive from grace.

God's grace is sufficient for us, and we know that all things can be done for the one who believes."

*John Wesley,
Founder, The United Methodist Church*

If you are interested in learning more or making a gift to Legacy Giving, please start by calling the church office at (813) 689-6849.

The purpose of this publication is to provide general gift giving information. Neither the author nor this organization is engaged in rendering legal or tax advisory service. State laws govern wills, trusts, and charitable gifts made in a contractual agreement. For advice and assistance in specific cases, the services of an attorney or other professional advisor should be obtained.

LEGACY GIVING

The Permanent Endowment Fund
of St. Andrew's UMC





Why Give?

Legacy Giving is a permanent endowment, established to provide a lasting legacy by members and friends of St. Andrew's.

Considerations for giving to Legacy Giving include:

- Legacy Giving is a way for a church member to provide a final gift/tithe to St. Andrew's or at any time provides an opportunity to honor a family member or friend.
- Zero dollars donated will ever be spent. 100% of all donations will remain in the fund in perpetuity.
- All gifts will be placed in an investment account managed by the Florida United Methodist Foundation.
- Annual investment income (first 3% earned) will be the source used for annual grants to grow new and enhance existing church programs at St. Andrew's.

What specific areas do my gifts support?

When giving, contributors can choose to designate their gift to one of three giving options:



Church Ministries



Capital Improvements



General (undesignated)

Gifting Ideas

Gifts you can make anytime:

- Cash Donation
- Appreciated Securities
- Charitable IRA Rollover (RMD)
- Appreciated Real Estate

Gifts you can defer by making SAUMC a beneficiary:

- Will Bequest
- Life Insurance
- Retirement Plan
- Brokerage Account
- Living Trust

Life income arrangements:

- Charitable Gift Annuity
- Charitable Remainder Annuity Trust
- Charitable Lead Trust



Planning Assistance

While committee members of Legacy Giving can discuss/review the different options that are available, it is always wise to seek out the advice of a professional financial advisor before making any donation decision.

Florida United Methodist Foundation (FUMF)

St. Andrew's will partner with FUMF, who will manage our investment dollars. FUMF today manages over \$96 Million for church endowment funds within the Florida United Methodist Conference. FUMF in turn partners with CAPTRUST, a company with over \$740 Billion in managed or under advisement assets.

If needed or interested, FUMF also has on staff licensed financial advisors that can walk you through the annuity options.

Website: fumf.org