

*“For where your treasure is,
there your heart will be also.”
Matthew 6:21*

A Summary...

1. Give securities (stocks, bonds, mutual funds)
2. Give life insurance
3. Give property
4. Give property, but reserve income for the giver
5. Give through your Will
6. Give through your trust
7. Give through the Memorial Fund
8. Give cash

All of us need to plan ahead. It is easy to postpone essential estate planning which will benefit ourselves, loved ones and our charities. We hope you will prayerfully consider *becoming a part of First Church forever.*

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415 West Main Street
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Lebanon First United Methodist

**Lebanon
First United
Methodist Church**

**How to
Become Part
of First
Church
Forever...
Our
Endowment
Fund**



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What is the Endowment Fund?

The Lebanon First UMC Endowment Fund is a collection of various gifts members and friends have given over the years. The fund was established in early 1991 for designated giving that could benefit the FUTURE of Lebanon First. A Board of Directors, selected from First Church members, administers and invests the Endowment Fund. There are five members on the Board of Directors, each serving a five year term.

Only the Income is used

The money that comes to the Fund is invested to provide income which the church can use for a variety of purposes. However, only the income is available to spend. The principal is protected so it can continue to produce income year-after-year and can grow as additional gifts are added to the Fund.

What are some gifts to consider?

Living Gifts — Many want to help advance the work of First Church by making gifts while they are living. Examples: Cash, securities, or other property.

Memorial Gifts — Memorial gifts to a loved one or a friend may be designated to the Endowment Fund.

Bequests — In consultation with your attorney, the Endowment Fund may be added to your Will in whatever amount or proportion you wish. Your Will should be reviewed periodically with your attorney to take into consideration any changing circumstances.

Charitable Gift Annuity & Charitable Remainder Trust —

These strategies provide income for you or your family while giving a gift to the Endowment Fund. In each case you may receive immediate tax advantages on a gift that will be received after your death.

Life Insurance — Do you own an old insurance policy that you no longer need? Not only can First Church cash in the policy, but you also can receive a charitable tax deduction. This can be a splendid way to benefit the Endowment without reducing your checking account.

Where should I start?

Careful estate planning usually requires the assistance and advice of a professional and we encourage you to discuss your desires with your personal legal and/or tax advisor. If you would like to discuss your plans with a representative of the church, please contact the church office at 444-3315.

Why our Endowment Fund is important...

Your gift will help you be a part of Lebanon First Church forever. Your gift will increase in value and the income will enable the Endowment Fund to fund other ministries. Your gift can be a tax-wise investment. Living gifts and bequests can help us now, as well as future generations.

Remember...

Gifts large and small are important and can make a difference in the present and future of Lebanon First United Methodist Church.

Call the office today,
444-3315 if you would like
more information.