



Who Administers and Distributes the Funds?

The Winder First United Methodist Legacy Ministry Committee administers these funds on an ongoing basis and distributions are made based on church endowment policies and the approval of church leadership. A financial report is presented in the Charge Conference each year and is included in the annual audit of church funds.

Winder First United Methodist Church has turned our lives around in our relationship with God and by the example of its doctrine, members and practices. It has become such a part of our lives that we can't imagine being without it. So much so, that we are investing in the Endowment Fund. There is no better way to leave a part of ourselves to the betterment of God's children at WFUMC.

Bob and Jean Anderson

Who Manages the Investments?

The investments are professionally managed through the Georgia United Methodist Foundation in Peachtree Corners, Georgia (www.gumf.org). The Foundation also provides confidential consulting services at no charge to the donors who are contemplating a planned gift to our church.

What is the Legacy Fellowship?

The Legacy Fellowship is composed of church members and friends who have contributed to the Endowment Fund or have indicated that they have included Winder First UMC in their will or estate plan, whether or not their gift is designated in the Endowment Fund. Gifts may be made in honor or memory of a loved one.

An annual event will recognize their commitment to the future ministry of the church. However, this would only be done with the prior approval of the donor. The committee respects the wishes of any donor who wishes to remain anonymous.

How Can We Help You?

I am interested in receiving more information about planned gifts and estate planning strategies. Please contact me.

I am interested in including my church in my estate plans. Please contact me to discuss my legacy.

I have included my church in my estate. Please contact me to review my legacy.

I am unable to consider the church in my estate plans at this time. But you may contact us in the future.

Please send me your FREE Estate Planning Guide.

Name _____

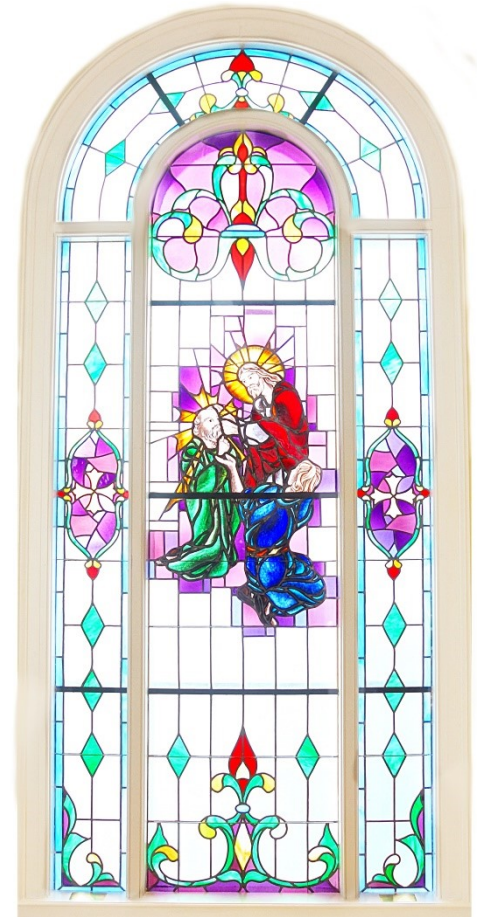
Street _____

City _____ State/Zip _____

Phone _____

Or you may contact:

Winder First United Methodist Church
280 North Broad St., Winder, GA 30680
(770) 867-4594
finance@winderfumc.com
winderfirstumc.com



**An Introduction to
Planned Giving at
Winder First United
Methodist Church**

*Charitable giving that benefits you
and supports our church.*



What Types of Assets May Be Gifted?

Gifts of any size are welcome and are a Tax deductible donation. Cash, insurance policies and publicly traded securities may be gifted without restriction. A 401(k) or IRA are excellent vehicles since a non-charitable heir would be taxed at regular income tax rates where as a charitable beneficiary would not be subject to tax. Closely held securities, real property, intangible personal property and other types of property may be given in accordance with the Gifts Acceptance Policy.

In What Forms May Gifts be Made to the Endowment Fund?

Gifts may be made in the form of outright gifts during your lifetime or at death through a will, an IRA, or insurance policy that can be conveyed with the designation of Winder First UMC and the beneficiary. Additionally, gifts may be made through charitable trusts during your lifetime or at death. The Legacy Ministry Committee and the Financial Manager can assist you in a specific transfer.

We are truly thankful for the many blessings in our lives, which include the fellowship we have enjoyed with our church family and the opportunity to worship and serve through our church's different ministries. Our gift to the Endowment Fund is a way of continuing to show our gratitude and ensuring that others after us may be similarly blessed.

Steve and Barbara Clark

What Ministries does the Endowment Fund Support?

Charitable endowment gifts create a meaningful legacy that provide the vital ministries that may not be funded through the regular giving of our congregation.

Contributions in any amount may be designated for any one of the six established endowment funds:

- * General Endowment
- * Capital Improvements and Unbudgeted Property Maintenance
- * Missions
- * Children's Ministries
- * Youth Ministries
- * Music Ministries

A new fund may be named in memory or honor of a person(s) and/or for a specific purpose with an initial investment of \$20,000 or more.

What is the Legacy Ministry and Permanent Endowment Fund?

A ministry established to provide members and friends of Winder First UMC to make charitable gifts to the church that will become a permanent endowment for support of the ministries of the church. This ensures a perpetual contribution to the ministry of the church because only the income is distributed for actual use.

Life Estate Agreements allow the donor to make a gift of personal or secondary residence or family farm to Winder First United Methodist Church. The donor retains the right to live in the house for life. The donor is responsible for upkeep, taxes, and insurance, as long as they reside in the home. This gives the donor substantial tax benefits.

We have been so blessed and one of the most precious blessings is our personal relationship with our Heavenly Father. Winder First UMC has been instrumental in guiding us in this journey. When you have been given such a treasure you want to share it with everyone. The Endowment Fund is an excellent way to ensure our church will be sharing the gospel well after we have gone on to the church triumphant. We wholeheartedly support the Endowment fund.

Dick and Jennie Mitchell

