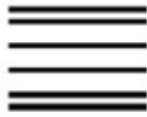




Connecting People Who Care
to Ministries That Matter

Thank you to our partners, *American Baptist Regions (Multi-Region Corporation)*, *American Baptist Home Mission Societies (ABHMS)*, and *American Baptist International Ministries (IM)*. *American Baptist Foundation (ABF)* encourages the support of these ministries.



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I would like to establish a planned gift!

Please complete & mail the form below to the ABF office.

Name _____

Street _____

City _____ Zip _____

Phone _____

E-mail _____

To return mail, fold form in half, this side facing in and seal with tape or staple.

MY GOALS:

Making a will that works for me, my loved ones, and ABC ministry & mission.

Reduce estate, capital gains, and income taxes.

Increase income and support my church or other American Baptist ministries & missions.

Other: _____

Planned Giving (a.k.a. "Legacy Giving") provides donors with an opportunity to support the long-term health of our American Baptist ministry and mission while meeting their financial needs and objectives. Planned giving usually involves the gifting of cash or appreciated assets in return for generous tax and/or financial benefits, including income. Gifts can be customized to help ensure that the legacy donors choose to leave gets fulfilled. As a partner, **American Baptist Foundation (ABF)** has prepared the following chart to highlight the goals and benefits of several common planned gifts.

We hope that this resource is helpful as you seek to secure your financial future while being a blessing to others.

Type of Gift	Goals	WHAT to Give	HOW to Give	Benefits
Bequest (Will / Living Trust)	Leave your Legacy! Maintain control of your assets now while making gift provisions for the future.	A determined amount (\$) A portion (%) or residual value of your estate	Provide a letter of instruction to the ABF office, indicating the ministries you desire to bless. Remember to name ABF as the beneficiary.	<ul style="list-style-type: none"> Estate tax deduction Lifetime use of the property
Charitable Gift Annuity (CGA)	In giving you receive! Receive fixed lifetime income based on very generous rates. A residuum value will go to support ministry and mission.	Cash Appreciated Securities	A CGA can be created for 1 or 2 lives. Your age and gift amount, among other methods, can be used to determine your rate and income.	<ul style="list-style-type: none"> Charitable tax deduction Fixed lifetime income Partial capital gains bypass Possible tax-free payments
Charitable Remainder Trust (CRTs)	A tax-wise way to give! Provide income for you and/or your loved ones for life, or a determined number of years. The remaining principal and interest goes to support ministry and mission.	Cash Appreciated Securities Real Estate / Personal Property	ABF can work with you and your legal/tax advisors to set up a CRT. Sample agreements can be created.	<ul style="list-style-type: none"> Charitable tax deduction Income for life or fixed term Capital Gains tax avoidance on sale of appreciated assets Possible tax-free payments
Testamentary Trust (Charitable)	Ensure your loved ones will not outlive their income! Help ensure that your loved ones will receive steady income, even after your lifetime.	Cash Life Insurance Retirement Plans Appreciated Securities Real Estate / Personal Property	ABF can work with you and your legal/tax advisors to set up a Testamentary Trust. Sample agreements can be created.	<ul style="list-style-type: none"> Estate tax deduction Flexibility through a Deferred Gift
Individual or Family Endowment	Create a lasting testimony in honor of a friend or loved one! Establish an endowment in the name of your family or loved one. The fund's income will support ministry.	Cash Appreciated Securities Real Estate Other Gift Agreements	Work with ABF to establish a purpose and name for your fund. Your endowment can be funded with a large one-time gift or over time.	<ul style="list-style-type: none"> Charitable tax deduction Capital Gains tax avoidance on sale of appreciated assets Possible tax-free payments
Revocable Trust (Charitable intent)	Just in case! A revocable trust can be structured like a CRT, but you retain complete control; however, there are <u>NO</u> tax benefits.	Cash Property	ABF can work with you and your legal/tax advisors to set up a Revocable Trust. Sample agreements can be created.	<ul style="list-style-type: none"> Revocable/Amendable No Tax Deduction Must have a charitable intent
Charitable Lead Trust (CLT)	Support ABC now, then revert ownership! Gift income from property to ministry now, then revert control of the property back to you or your loved ones later.	Cash Income producing property Appreciated Securities	ABF can work with you and your legal/tax advisors to set up a CLT. Sample agreements can be created.	<ul style="list-style-type: none"> Capital Gains tax avoidance on sale of appreciated assets Possible tax-free payments
Life Estate	Occupy your gift! Make a gift of your primary residence now while retaining its use and enjoyment during your lifetime.	Primary residence	ABF can work with you and your legal/tax advisors to set up a life estate. Sample agreements can be created.	<ul style="list-style-type: none"> Charitable tax deduction Lifetime use of the property
Life Insurance	Extra Insurance! Ensure the continuation of ministry by making a substantial gift.	Current or new Life Insurance policy.	Assign ABF as policy owner and/or list us as a beneficiary. Let us know which ministries you desire to support.	<ul style="list-style-type: none"> Possible charitable tax deduction for transferred policies and premiums Meaningful gift for ministry

The information in this publication is not intended as legal or tax advice. For legal and tax advice, please consult an attorney or a certified tax professional.