

First Parish Church Planned Giving Web site **proposal**

Prepared by Stewardship Team

March 19, 2019

Planned Giving – our goals and plans

- ✓ Provide an educational experience versus providing any consultee
- ✓ Provide a Guideline/Policy for making donations to First Parish Church
- ✓ Communicate via our Web page, Newsletter, Pastor's Pen, and etc.
- ✓ Conduct a learning/sharing experiences (45-60 minutes after Sunday Worship)
 - ✓ Sunday January 28th
 - ✓ Sunday February 11th

Planned Giving

Welcome! We are pleased that you have an interest in learning about the many benefits of making a planned gift. If you have any questions about the best way for you to benefit through a planned gift, please call a member of our Stewardship Committee we will be very pleased to help you.

Planned Giving lays a foundation for the future for all concerned, givers and receivers alike. Indeed, much of our current success and security is built on the foundation of previous generations' generosity. When you contribute to First Parish Church through planned giving, you strengthen the foundation for future generations to build upon.

First Parish Church Gift and Endowment Policies



Christian stewardship is awareness that everything we have is a gift from God.

[More](#)



Wills & Bequests



A charitable bequest is one of the easiest ways you can leave a lasting impact on our organization.

[More](#)



Gifts that Produce Income

How does a Gift Annuity work?

[More](#)



First Parish Church Gift and Endowment Policies



PDF version of the policies for
you to print. *Click*



Growing Generosity Planned giving Video click on box and play

As people of faith, we are called to be good stewards of the assets with which we have been entrusted. This calls for faithful financial and estate planning for ourselves and families to assure that future needs will be met.

Additional resource information from United Church of Christ
Planned Giving Opportunities Web page Learn [more](#)



Additional resource information from United Church of Christ
Planned Giving Glossary Web page Learn [more](#)



Wills & Bequests



Why have a Will?

A Will gives instructions to your survivors on how to distribute your estate after your death.

Who should have a Will?

Every person needs a Will regardless of her/his life season.

Learn [more](#)



Charitable Bequest

A charitable bequest is one of the easiest and most flexible ways that you can leave a gift to First Parish Church that will make a lasting impact.



Updating and Changing Your Will, Trust, and/or other Testamentary Documents:

Your Will, Trust, and/or other Testamentary Documents should reflect the current circumstances of your life.

The following are some life changes which may require your Will, Trust, and/or other Testamentary Documents to be reviewed, and possibly updated:

- a change in family status such as marriage, divorce, birth of a child or grandchild, or emancipation of a child;
- a change in the nature or value of your estate;
- a change in laws that affect estate planning; or
- a change in your place of residence from one state to another. Your attorney can advise you on making or updating your Will, Trust, and/or other Testamentary Documents.

Bequest Language Learn [more](#)



IRA Charitable Rollover



What is a charitable IRA rollover?

The charitable IRA rollover, or qualified charitable distribution (QCD), is a special provision allowing certain donors to exclude from taxable income -- and count toward their required minimum distribution -- certain transfers of Individual Retirement Account (IRA) assets that are made directly to public charities, including the First Parish Church.

Can a rollover gift be used to pay my pledged/Estimate of Giving to First Parish Church?

Yes. You can honor your gift pledge to First Parish Church with one or more qualified charitable IRA rollover transfers of up to \$100,000 per person, per calendar year.

How ?

Simply contact your financial services provider to complete the Charitable donation form/information. Have your provider indicate that the transfer is a gift from you.

Gifts that Produce income

How does a Gift Annuity work?

[More](#)



What is Charitable Gift Annuity? How can it provide you an income for life? [Donor Driven Approach](#)



Donor Advised Fund,
Community Foundation or
"named" charity

Gift stocks, real estate or cash.

How does a Gift Annuity work?

Gift Annuity rates* are based on age: the older you are, the higher your rate. Multiplying your rate by the amount of your gift will show the annual income amount you would receive over your lifetime.

What is a Gift Annuity?

A **Gift Annuity** is an irrevocable agreement in which a donor transfers cash or appreciated securities to a Annuity Fund in return for lifetime annual income of a fixed amount. Thereafter, the remaining principal benefits the organization designated by the donor .e.g. First Parish Church

Annuities are **complex investments** and there are many annuity options and strategies. You'll want to explore all your alternatives before making a final decision. We have provided the United Church Funds of the United Church of Christ as one example of a Gift Annuity.