



## Making a Legacy Gift in your Will

The following is the suggested language for making a gift in your *Last Will and Testament* to your church. It is quite simple and with the help and guidance of your legal advisor and your family, it can be customized to meet your specific giving needs and legacy goals.

Three general choices are available, an “**Outright Gift**”, a “**Residuary Gift**”, or a “**Contingent Gift**”.

- **Outright** - “I hereby leave 10% of my estate to \_\_\_\_\_ UM Church.”
- **Outright**- “I hereby leave \$\_\_\_\_\_ of my estate to \_\_\_\_\_ UM Church.”
- **Residuary** – “The residual assets of my estate are to be divided in half, with one half to \_\_\_\_\_ and the other half to \_\_\_\_\_ UM Church.” (can be any specific percentages)
- **Contingent** – “I hereby leave \$5,000 to my great niece for her college education. In the event she has completed college at the time of my death, the bequest shall be given to \_\_\_\_\_ United Methodist Church.”

NOTE: Loved ones or charities can benefit from any of these gifts and estate taxes may be reduced.

You may additionally include your church as a beneficiary of your **Retirement Plan** (IRA, 401k, 403b, etc.) or as a named beneficiary of a life insurance policy. Additionally, the Mid-Atlantic United Methodist Foundation offers a **Charitable Gift Annuity** program that may provide you with an attractive income today and a lasting gift for your church.

For more information on these gifts or to make an appointment to discuss a Legacy Gift for your church please call the Mid-Atlantic United Methodist Foundation at 484-762-8247. All discussions are held in the strictest confidence.