

You can establish a Foundation Donor Advised Fund with as little as \$10,000, and you may make additional contributions of any size at any time. Each gift represents an unconditional, irrevocable charitable contribution and is not refundable.

The annual distributions from Foundation Donor Advised Funds primarily benefit charitable organizations that are related to the United Methodist Church. Charities that are unrelated to the United Methodist Church, but that are compatible with the Church's mission can be considered for a portion of annual fund distributions.

Establishing your Foundation Donor Advised Fund can be as easy as filling out a form and writing a check. For more information, contact your Missouri United Methodist Foundation at **800-332-8238**.

DONOR ADVISED FUND VERSUS PRIVATE FOUNDATION

If you are considering creating a private foundation to accomplish your charitable goals, consider the benefits of a donor advised fund first. A donor advised fund offers similar involvement and direction without the expense and administrative burden. Furthermore, the donor advised fund provides all the tax benefits of a public charity.

Remember, to claim charitable gift deductions you must itemize deductions on your income tax return.

This publication is intended for general informational purposes and is not a source of legal or tax advice. Individuals should consult professional advisors regarding all appropriate matters.

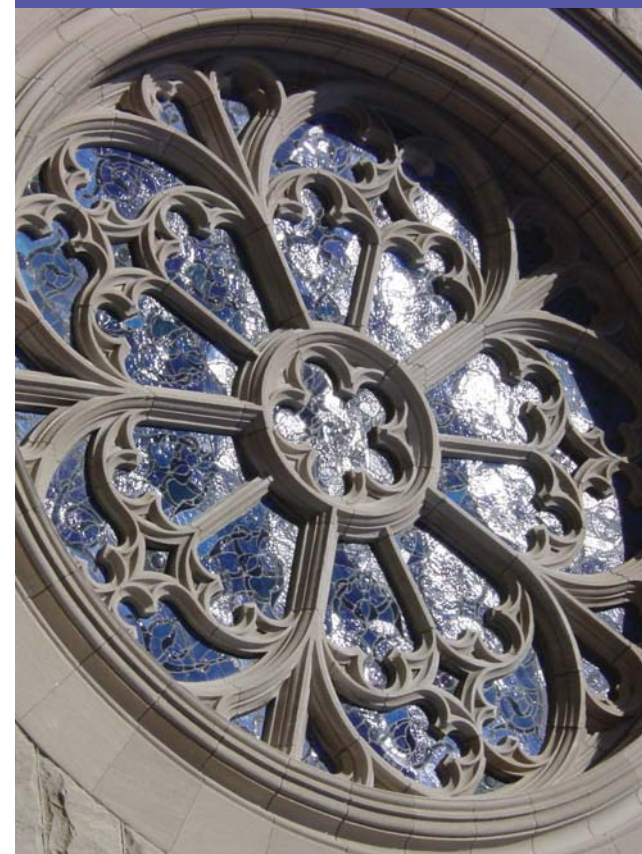


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planned giving
endowments
grants

scholarships
church investments
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DONOR ADVISED FUNDS



DONOR

ADVISED

FUNDS

Gain all you can, without hurting either yourself or your neighbor...save all you can, by cutting off every expense which serves only to indulge in foolish desire...and then give all you can..." *-John Wesley*

A CONVENIENT OPTION FOR YOUR GIFTS TO THE CHURCH...

The Foundation offers Donor Advised Funds as a convenient option for giving to your favorite United Methodist ministries. By establishing such a fund at the Foundation, you can minimize your taxes by making charitable gifts to your fund, but decide later which charities will benefit.

THE BENEFITS OF A DONOR ADVISED FUND INCLUDE:

- You can make a gift to your Fund at the time most convenient for you and receive an immediate charitable deduction.
- You can decide later what charity(ies) you recommend to receive distributions, how much and when.
- Earnings are credited and compounded tax-free so that more money may be available for your favorite charities.
- You can pass on important values of service and caring for others by involving children or other family members in charitable gift recommendations.
- You and others may add to your Fund any time. All gifts will be acknowledged by the Foundation, and you will be advised of contributions received.
- You will receive an annual statement of all contributions, distributions and Fund earnings.



A DONOR ADVISED FUND IS ESPECIALLY ATTRACTIVE WHEN YOU HAVE STOCK OR REAL ESTATE AND:

- You wish to bypass any capital gains tax that would be due if you sold it.
- The value is more than you want to give any one charity.
- You want to transfer the asset all at once and avoid having to accomplish multiple transfers of fractional shares to many different charities.