

What is Planned Giving?

Planned Giving simply means gift planning. A planned gift to a congregation is a thoughtful commitment to the future of the church. Individuals plan to contribute assets at some time in the future by making the appropriate arrangements now - it's a deferred gift. They maximize tax and other financial benefits at the same time, as they meet their charitable objectives. The donor may designate their planned gift for a special purpose, such as a building project, a long term operational need, the endowment fund, etc.

The assets may take the form of:

- Savings
- Investments (e.g. stocks and bonds)
- Retirement plan benefits
- Real estate
- Life insurance policies
- Tangible personal property (e.g. art, jewelry).

Planned gifts are meant to perpetuate something of great value and meaning. Often, a planned gift is the ultimate gift a person can make, both in size and finality.

What is the Endowment Fund?

The Church Endowment Fund was established for the sole purpose of providing supplemental funding of programs and services.

An Endowment Fund is allowed to grow and provide for the long-term financial stability of the ministry. The interest from the fund often is used for necessary church expenses, including outreach, missions, etc..



First Congregational United Church of Christ



Planned Gifts

A Way to Leave Your Legacy

*"..For everything is
from You, and we only
give You what we
already have received
from You."*

~1 Chronicles 29:14-16

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There may be many reasons why you want to Leave Your Legacy

- To commemorate the life of a loved one.
- To celebrate a long history of membership in this church.
- To continue the mission of the church for decades to come.
- To assure funds are available to keep the church and ministry viable for future generations.
- To purchase specific items needed by the church.
- To support a special need or program of our church.
- To build the Endowment Fund.

"A strong planned giving program is essential to the long-term stability of our church. Please consider a gift that will keep First Congregational Church "Alive in the Spirit."

Here are ways to Leave Your Legacy To First Congregational Church

- Gifts by Bequest or Will
- Gifts of Cash
- Gifts of Life Insurance
- Gifts of Life Insurance Annuities
- Gifts of Mutual Funds
- Gifts of Securities, Investments and other Properties
- Gifts of Charitable Trust
- Gifts of Qualified Retirement Plan Benefits.

How to begin to Leave Your Legacy

- Pray to God for guidance in making your decision
- Remember all who will benefit for years to come
- Contact your Accountant, Financial Consultant or Attorney
- Establish an Estate Plan: To protect your assets so they last your entire lifetime; to transfer your assets at death with the least amount of cost to your heirs and to arrange ownership of your assets and ensure they go to whom you choose.
- Establish a Will or Trust
- Properly arrange ownership of your property so it corresponds to your Will or Trust
- Include First Congregational Church in your Will or Trust and Leave Your Legacy

Who to contact to Leave Your Legacy

- Your Accountant
- Your Financial Consultant
- Your Attorney
- Church Office

"This is our opportunity to leave lasting gifts that will benefit First Congregational Church forever."

