



UNITED METHODIST FOUNDATION

of North Alabama

CHURCHES WORKING TOGETHER

\$38 MILLION AND GROWING

The North Alabama United Methodist Foundation is a resource and educational agency of the North Alabama Conference of The United Methodist Church specializing in:

- **Wills**
- **Leadership Development**
- **Financial Planning**
- **Estate Planning**
- **Stewardship**

The Foundation provides churches and donors creative stewardship resources to undergird future missions and ministries. The Foundation also provides important investment opportunities, administers endowments, and cultivates permanent endowment funds for churches.

**Invest with the
United Methodist Foundation today!**

FOUNDATION RETURNS

	2012	2013 1st Quarter
Foundation Trust Fund	1.506%	0.370%
Income Fund	6.725%	0.346%
Balanced Fund	9.485%	4.082%
Social Index Fund	9.592%	14.216%

GIFT ANNUITY

A gift annuity is a specialized estate planning vehicle which gives you a great yield today while at the same time you make a lasting gift to your favorite Methodist ministry. Listed below are the current rates for a gift annuity. The more birthdays you have celebrated, the higher the rate you lock in! Additionally, at the time of establishment you receive a generous one time charitable gift tax deduction.

Age	Annual Rate
65	4.7%
70	5.1%
75	5.8%
80	6.8%
85	7.8%
90+	9.0%

COMPARISON: GIFT ANNUITY VS. CERTIFICATE OF DEPOSIT

	CD	Gift Annuity
Rate	1%	5.8%
Charitable Gift Tax Deduction	0	\$4,100

Compare rates of a CD versus a Gift Annuity. A 75 year old would lock into a 5.8% guaranteed rate of return. The rate would never go up or down — it is set and established at the start of the annuity.

On a \$10,000 gift annuity, the donor would receive a charitable gift tax deduction of \$4,100. At the end of the donors' lifetime, the gift annuity remainder is transferred to the donor's favorite Methodist ministry. With a gift annuity you get a great rate, receive a tax deduction, and know you have made a lasting difference to your favorite ministry. You could leave a gift annuity to your church, Camp Sumatanga, Children's Home, Homes for the Aging, and many other great Methodist ministries.



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