

Building YOUR Philanthropic Legacy

WITH TEXAS METHODIST FOUNDATION

Philanthropic planning is a wonderful way to share your story. As the story of the people, places, ideas and values that shaped you, philanthropy can be a bridge connecting your past, present and envisioned future.

A gift plan is an enduring expression of your life, your values and your vision for the future. Gift plans steward your wealth, take care of your family, and directly benefit the charities and communities you care about most.

Over our 80+ year history, TMF has walked along side donors focused on one key question – how can we help you realize your vision of the world that God imagines?

TMF's gift planning team will work closely with you and your advisors, getting clear on your priorities and values and crafting a strategy that maximizes your philanthropic legacy.

For more information on gift planning, please contact:



Justin Gould

Vice President of Foundation Relations

P 512.583.1944

E JGould@tmf-fdn.org

How to Give	Advantages to Giving	Gift Type
Bequeath your personal estate in your will	Exempt from federal estate taxes in some cases	Bequest
Create a charitable fund that allows you to recommend beneficiaries and investment options	Immediate income tax deduction, ability to recommend the distribution of grants	Donor-Advised Fund (DAF)
Enter into a contract that makes fixed payments annually, quarterly or monthly	Current and future savings on income taxes; fixed payments for life	Charitable Gift Annuity (CGA)
Make a tax-free gift from your IRA	Satisfies Required Minimum Distribution (RMD) without increasing income taxes	Qualified Charitable Distribution (QCD)
Make a tax-free gift from your IRA to fund a life-income gift	Establish a fixed income for life	Charitable Rollover Gift Annuity
Create a charitable trust that pays you a set income annually	Immediate income tax deduction and fixed income for life	Charitable Remainder Annuity Trust (CRAT)
Create a trust that pays a percentage of the trust's assets, valued annually	Immediate income tax deduction, annual income for life that has potential to increase	Charitable Remainder UniTrust (CRUT)
Create a trust that pays a fixed or variable income to your church or public charities for a set term and then passes to heirs	Reduced size of taxable estate; keeps property in family, often with reduced gift taxes	Charitable Lead Trust
Name a favorite charity as the beneficiary of all or a portion of your retirement assets	Minimize tax burden to heirs	Retirement Plan Gift

Prior to making any gifts, we encourage you to speak with your advisors, who can partner with TMF, to determine the best strategy to pursue your charitable goals.

Charitable Gift Planning

For more information please contact Justin Gould at jgould@tmf-fdn.org or 800.933.5502



	Donor-Advised Funds	Endowment	Charitable Gift Annuity	Charitable Remainder Annuity Trust (CRAT)	Charitable Remainder Unitrust (CRUT)	Charitable Lead Annuity Trust (CLAT)	Charitable Lead Unitrust (CLUT)
Cost to Initiate	Free	Free	Free	Legal Fees	Legal Fees	Legal Fees	Legal Fees
Minimum Investment	\$10,000	\$25,000	\$5,000	\$100,000	\$100,000	\$250,000	\$250,000
Assets to Begin	Cash, Securities, Life Insurance, Real Estate	Cash, Securities, Life Insurance, Beneficiary of CGA/ CRT	Cash, Securities	Cash, Securities, Real Estate	Cash, Securities, Real Estate	Cash, Securities, Life Insurance, Real Estate	Cash, Securities, Life Insurance, Real Estate
Additions	Yes	Yes	No	No	Yes	No	Yes
How Invested	TMF Investment Notes, Balanced and/or Wespath Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio
Income	Charity	Charity	Donor	Donor	Donor	Charity	Charity
Charitable Deductions	Yes	Yes	Partial	Partial	Partial	Partial	Partial
Fees	<\$1M = 0.85% \$1M-<\$3M = 0.6% ≥\$3M = 0.3%	<\$1M = 0.85% \$1M-<\$3M = 0.6% ≥\$3M = 0.3%	0.50%*	0.50%*	0.50%*	0.50%*	0.50%*

*Less if 50% of remainder stays at TMF