



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.

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

To help you answer this question, TMF's philanthropy team will begin by learning more about your charitable interests, the charities you currently support and how that support can be maximized into the future. Our gift planning team will also share with you our many relationships across Texas and New Mexico of impact ministries and nonprofits that might potentially align with your vision and values.

A Donor-Advised Fund (DAF), described in detail here, is a popular tool for implementing charitable gifts and might provide a tax saving strategy for creating the impact you dream of through charities that most closely embody your story and reflect your values. Your DAF can be invested in the market, grow tax-free and be the philanthropic bridge to share your values with your children and grandchildren.

Please contact TMF to start a conversation and discuss how a DAF can help you accomplish your charitable goals today and extend your legacy for generations to come.



READY TO MAKE AN IMPACT?

A member of our philanthropy team would be happy to speak with you about giving strategies that fulfil your plans to support the charities that matter most to you. All conversations are confidential with no obligation.

Visit texasmethodistfoundation.planmygift.org

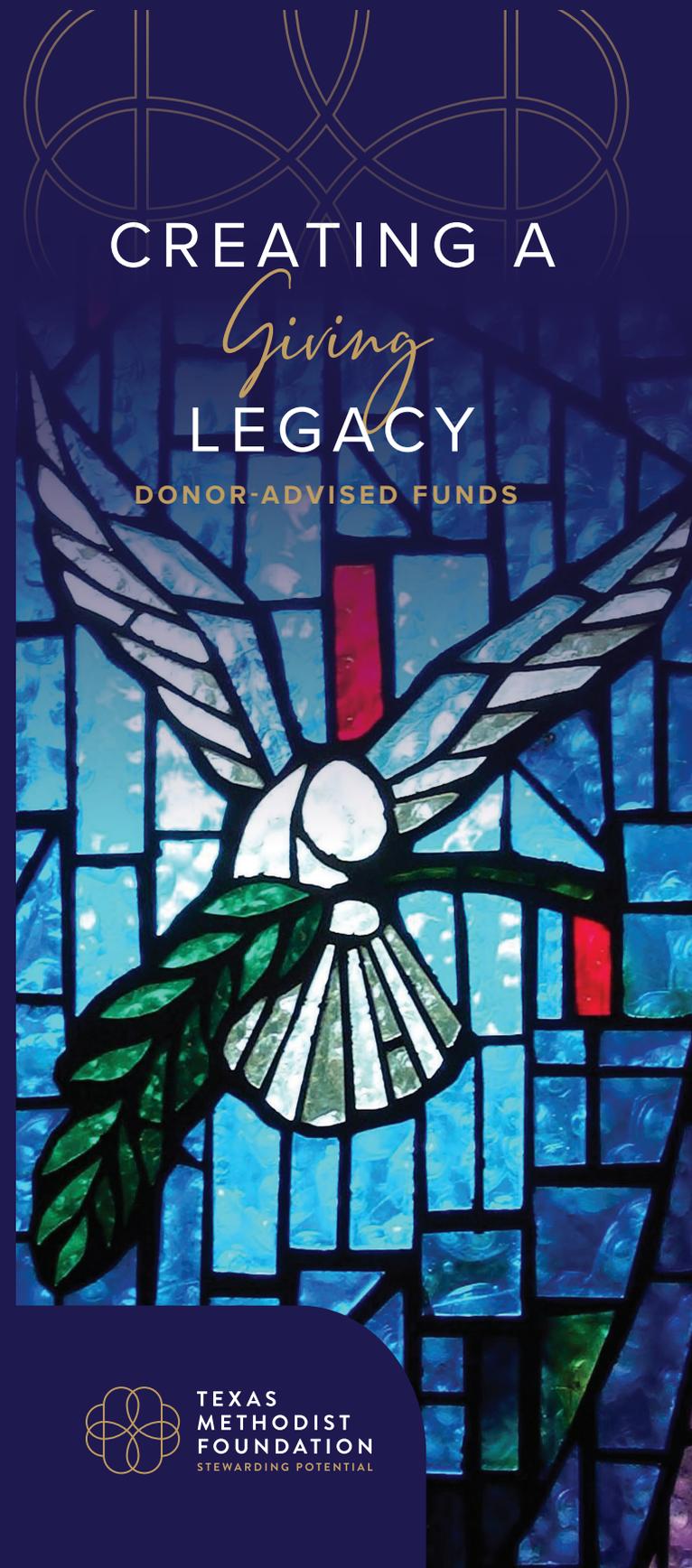


Call 512-583-1940 or scan the QR code to request more information.

CREATING A

Giving LEGACY

DONOR-ADVISED FUNDS



Justin Gould
Chief Philanthropy Officer

The information in this document is not legal or tax advice. Consult your attorney and tax advisors for guidance.



**TEXAS
METHODIST
FOUNDATION**
STEWARDSHIP POTENTIAL

How Donor-Advised Funds Work

A Tax-Deductible Gift Funds Your Philanthropy

A DONOR-ADVISED FUND (DAF) IS A CHARITABLE GIFT VEHICLE ADMINISTERED BY TEXAS METHODIST FOUNDATION.

You create a simple fund agreement with Texas Methodist Foundation and then contribute cash, stock or other assets to your fund to support causes and organizations you care about. You receive an immediate charitable tax deduction when you make contributions to your DAF. The minimum to establish a fund is \$10,000.

Support Your Favorite Charities with One Gift

BENEFITS OF A DAF:

- Provides flexibility to support your current giving priorities
- TMF provides annual charitable tax information for your records
- Tax free growth for your charitable giving
- TMF can provide research and insight into causes you want to support
- Grants can be made in your name or anonymously



Growing Your Fund

YOU MAY RECOMMEND, FROM TMF'S AVAILABLE OFFERINGS, HOW YOUR GIFT IS INVESTED.

TMF offers a menu of competitive investment options that appeal to a growing range of donors seeking to amplify their giving power through a portfolio of investments managed by Wespeth Institutional Investments. Depending on your time horizon you may select from one or a combination of the following:

- TMF Impact Certificates
- TMF Balanced Fund
- TMF U.S. Equity Fund
- TMF International Equity Fund
- TMF Fixed Income Fund
- TMF Inflation Protection Fund

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Your Generosity Matters

TMF CAN HELP YOU CREATE A PLAN TO GIVE NOW AND IN THE FUTURE.

A member of our philanthropy team would be happy to speak with you in confidence to share how a DAF can support your philanthropic goals. We look forward to working with you and your advisors to ensure that your charitable gift will become an enduring and meaningful legacy for years to come.

If you have questions about Donor-Advised Funds or other ways to leave a lasting legacy, please contact us.

Contact us at (512) 583-1940.