



Philanthropy Services for Organizations

The time is now to plan for impact in your community! In the coming decades, more than \$80 trillion will transfer from one generation to the next and that could mean a transformational gift to your church or nonprofit. The Philanthropy team is available to guide you through the creation of long-term sustainable funding strategies to support your mission and ministries, which often includes the establishment and growth of an endowment. Let us be your partner to empower leaders, churches, and nonprofits now and into the future.

CONSULTATION

Our team provides expert guidance to build long-term funding for your organization through endowment and gift planning education and marketing. Each organization has a unique culture of philanthropy, and our goal is to help you build a strategy that honors your history and reflects your goals.

“At Texas Wesleyan, we deeply value our partnership with Texas Methodist Foundation. Their support helps us resource our mission and vision with long-term sustainability in mind — especially as we expand initiatives that provide meaningful tools and guidance to our donors and supporters. It’s a personal and strategic connection that empowers our advancement efforts and strengthens our shared commitment to transformational impact.”



MICHELE BOILLOTAT

VP for Advancement,
Texas Wesleyan University

EXPERTISE

We have extensive experience in personal philanthropy and organizational strategies to drive philanthropic support, including gift planning for individuals and families.

CHARITABLE PLANNING EDUCATION

“Your Generosity Matters” gift planning seminars for your members and donors

- Personalized philanthropic seminars specific to the goals of your organization
- Strategies to build donor loyalty

RESOURCES

- Personal Estate Planning Kit (PEPK)
- *Passing Your Story on to Your Loved Ones* workbook
- texasmethodistfoundation.planmygift.org
- Marketing toolbox for gift planning including a suggested 12-month marketing plan
- Personalized “Ways to Give” collateral to promote giving to your organization
- Sample policies and procedures for endowment gift acceptance, and investment

PROFESSIONAL ADMINISTRATION

- Endowments
- Donor-Advised Funds (DAFs)
- Life income gifts, including charitable gift annuities and charitable trusts
- Designated Gift Funds



Call 512-583-1940, visit our website at texasmethodistfoundation.planmygift.org, or scan the QR code for more information.



Philanthropy Services for Individuals

Your generosity matters. Charitable giving tells the story of the values that shape us and bridges the past, present, and future. We work closely with you and your advisors to create a charitable giving plan to take care of your loved ones and support the charities, churches, and communities that mean the most to you. Plan your philanthropy today with our help!

PLANNING CONVERSATIONS

- Align your assets and charitable goals
- Supports your loved ones, communities, and charities you love
- No cost and confidential

RESOURCES

- Personal Estate Planning Kit (PEPK)
- *Passing Your Story on to Your Loved Ones* workbook
- texasmethodistfoundation.planmygift.org
 - Free, no obligation online gift calculator to find the gift that is right for you. Calculate deductions, tax savings and other benefits — instantly!
 - Sample language for your will or living trust
 - Inspiring donor stories

PROFESSIONAL ADMINISTRATION

- Endowments
- Donor-Advised Funds
- Charitable Gift Annuities
- Charitable Remainder Trusts
- Charitable Lead Trusts

CHARITABLE PLANNING EDUCATION

- “Your Generosity Matters” seminars held online and in-person



“I found a way to make sure my faith continues to shine through my church for generations. I want this church to be here long after I’m gone, for my daughter and her family and anyone else who needs a place to land.”

— SCOTT ROBERTS

Created The Roberts Family Endowment through Texas Methodist Foundation to support his church



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