

LEAVE A LEGACY

What kind of legacy will you leave? A bequest is perhaps the easiest and most tangible way to have a lasting impact on the people and organizations that mean the most to you. A bequest may also be an effective way to make a gift to ministry and lessen the burden of taxes on your family and estate.

AN EASY GIFT TO MAKE

A charitable bequest is a bequest written in a Will or Trust that directs a gift to be made to a tax-exempt ministry when you pass away. One benefit of a Charitable Bequest is that it enables you to further the Lord's work. Also, a Charitable Bequest can help you save estate taxes by providing your estate with a charitable deduction for the value of the gift. With careful planning, your family can also avoid paying income taxes on the assets they receive through your estate's distribution.



I have reviewed your brochure and:

- I would like to speak with someone who can provide additional information.
- I would like to receive information on other charitable gift planning options.

Name _____ DOB / /

Name _____ DOB / /

Street _____

City _____

State/Zip _____

Home Phone _____

Cell Phone _____

Email _____

Home Church _____

Please complete and return. All inquiries are treated with complete confidentiality.



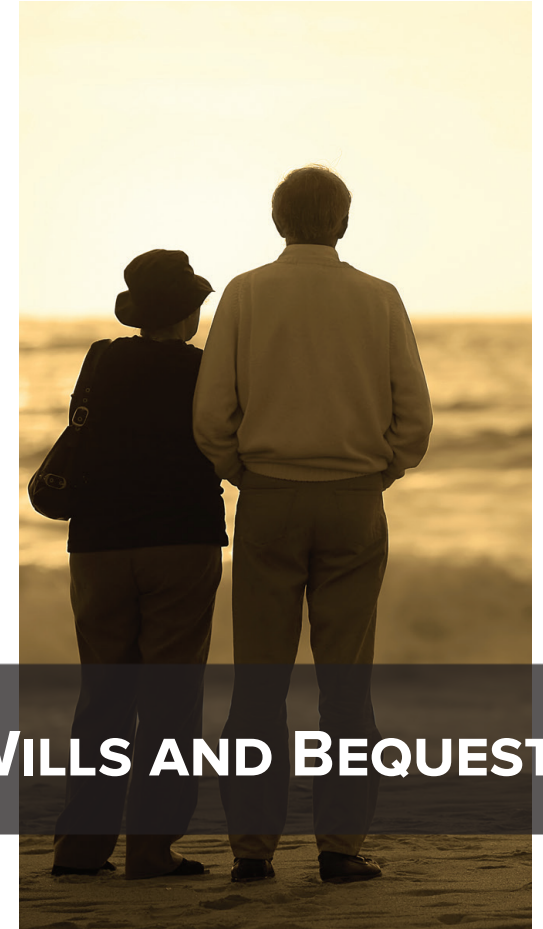
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WHAT LEGACY WILL YOU LEAVE?



WILLS AND BEQUESTS



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A BEQUEST TO FURTHER GOOD WORK

Linda and Marty Patel served as volunteers for many years in their local church. They made current gifts, but wanted to do more. The Patels learned that they could help by making a bequest. Their attorney revised each of their Wills to include a provision gifting a percentage of their estate to their church and the Evangelical Free Church of America. The Patels liked the fact that a gift by bequest was easy to do. They could continue to use their assets during their lives and their estate would be permitted a charitable deduction at their death. Best of all, the bequest would help achieve their goals by supporting their church and the EFCA.

Please note: The name and image above is representative of a typical donor and may or may not be an actual donor to our organization. Since your benefits under federal rules may be different from this example, please contact us.



WHAT LEGACY WILL YOU LEAVE?

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your Will or Trust specifying a gift to be made to family, friends, or ministry as part of your estate plan.

A bequest may be made in several ways:

- Gift of a percentage of your estate
- Gift of a specific asset
- Gift of the residue of your estate

OTHER TYPES OF BEQUESTS

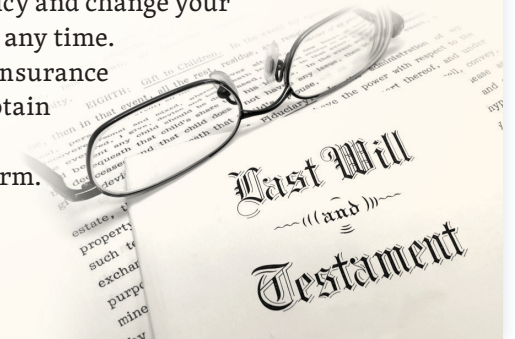
Certain types of property pass outside of a Will or Trust. These assets require that you name a beneficiary by completing a beneficiary designation form. To make a bequest of these assets, you should contact the company or entity from which you purchased the asset. Here are a couple of examples:

Bequest of an IRA

A retirement asset like an IRA account makes an excellent bequest to ministry. If the IRA were given to your family, much of the value would be depleted through estate and income taxes. By designating a ministry as the beneficiary of part or all of your IRA, the full value of the gift is transferred tax free at your death, and your estate receives a charitable deduction. If you wish to leave your IRA to your spouse at your death, you may also designate a ministry as the secondary beneficiary of your account. Contact your IRA or retirement account custodian to obtain a beneficiary designation form and make a bequest from your IRA.

Bequest of Insurance Policy

An insurance policy makes a nice bequest to ministry. As an asset of your estate, an insurance policy is taxable at your death. However, if the policy is gifted to ministry, your estate avoids paying tax on the value of the policy and receives a charitable deduction for the gift. You may generally name anyone as beneficiary of your insurance policy and change your designation at any time. Contact your insurance company to obtain a beneficiary designation form.



Gifts by bequest or beneficiary designation to the [Evangelical Free Church of America](#) are appreciated.