

South Congregational Church

Planned Giving and our Legacy Society



***“Giving Today for
Tomorrow’s
Mission”***

**South Congregational Church,
UCC
27 Pleasant St
Concord NH 03301**

CALLED TO BE GOOD STEWARDS

As members and friends of the United Church of Christ, we are called upon to be good stewards of the assets with which we have been blessed. Good stewardship includes faithful financial planning for ourselves and our families to assure that future needs will be met.

WHAT IS A FINANCIAL PLAN?

Financial planning can take many forms, but every financial plan should include a current and up-to-date estate plan, whether it be a will or trust or other testamentary planning tool.

WHAT IS PLANNED GIVING?

Planned Giving generally refers to gifts that we make from our accumulated assets or other sources, such as insurance proceeds or annuities, to support the missions and activities of charitable or religious organizations of the donor’s choice. It may also mean providing for the church that we have loved and served during our lifetime, so that it may remain vital in years to come. Anyone can make a planned gift. Planned gifts can take many forms including: wills, trusts, life insurance, gift annuities, real estate, and securities.

CAN I MAKE A PLANNED GIFT WHILE I AM ALIVE?

Yes, there are many financial planning options that allow you to make gifts during your lifetime.

WHAT ARE THE BENEFITS OF PLANNED GIVING TO THE DONOR?

Here are a few examples of the many benefits of planned giving to you:

- ❖ Your gift is a lasting statement of your good stewardship of your assets and of your faith in God that continues beyond your lifetime
- ❖ Your gift is a declaration to God, family, and friends of what you hold dear at the time of your death, and if South Church is included in your giving, a declaration that you believe in and care about the missions of the church
- ❖ If South Church is included in your giving, you will be automatically listed as a Legacy Builder of the Church
- ❖ You may receive income tax benefits as a result of your gifts which may allow you to provide more funds to for your family, heirs, and the charities that you care about than would otherwise have been possible

MAY I RESTRICT THE PURPOSES FOR WHICH MY GIFT MAY BE USED?

Yes, but unrestricted gifts will give our successor congregations more flexibility in responding to the unique needs of the future.

WHAT ARE THE BENEFITS OF PLANNED GIVING TO SOUTH CHURCH?

Here are a few examples of the many benefits of planned giving to South Church and the communities that it serves:

- ❖ Your gift provides an important base for long-term financial strength and growth of the church
- ❖ Your gift supports existing and new missions that would otherwise not be possible within the yearly operating budget of the church
- ❖ Your gift can also benefit your favorite programs and activities or encourage new missions
- ❖ Your gift can provide for the future continuity and stability of the church, and support for its outreach into our wider community

WHAT IS THE LEGACY SOCIETY?

The Legacy Society is a group of persons who have remembered the Church in their financial or estate plans. The Legacy Society will meet at least annually so that the Church can express its gratitude to them, and throughout the year, they will be an important resource to the Church as it considers new mission opportunities or initiatives within the congregation and in our wider community.

WHAT DOES A PLANNED GIFT LOOK LIKE?

Many types of gifts and methods of giving are available to you. Your lawyer or financial advisor can explain which method may be best suited for you. Some options are:

- ❖ **Outright Gifts:** The simplest way of giving. Current tax laws may offer immediate advantages for such gifts.
- ❖ **Bequest by Will:** Another simple way of giving. South Church can be included in a new will or added to an existing will.
- ❖ **Life Insurance and 401(k)'s:** Name South Church as the beneficiary. The premium payments may be tax deductible.
- ❖ **Gift of Securities or Property:** A gift of appreciated securities or real estate may offer special tax advantages to you.
- ❖ **Creation of Trust:** A trust can be designed to meet any special set of circumstances to guarantee the family's current and future needs and provide a future gift to South Church.
- ❖ **Gift Annuity:** By establishing a gift annuity, you may be able to receive income on an ongoing basis and still provide a gift to South Church in the future.

NEED MORE INFORMATION?

If you need more information, or would like to talk to someone about Planned Giving, please fill out this page and leave it at the Church Office.

Name: _____

Address: _____

City: _____

State: _____ Zip: _____

Email: _____

Telephone: _____

- I would like more information about Planned Giving
- I've included South Church in my estate plans (and have not previously notified you)
- I would like to talk to someone about Planned Giving

For information about making a planned gift, please see Rev. Jed Rardin or Rev. Carlos Jauhola-Straight, or call Ferd Prevost at 224-7863 or Peter Imse at 224-7335. Church Phone: 603 224-2521
www.sochurch.org