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PROPER PLANNING CAN HELP EASE YOUR MIND

Having an estate plan in place can bring peace of mind in an ever-changing world.

Once established, your plans should be reviewed regularly to be sure they keep up with the changes in your life.

For example, the birth of a child, a change in marital status, or a career change that brings substantially greater earnings are the types of life events that can call for a review of your will and other plans.



Photo: James Rollins

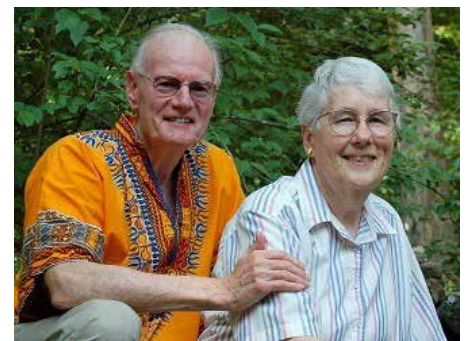
Melissa Crutchfield (center), UMCOR's associate general secretary for International Development, joins members of the community in Kamina, Democratic Republic of Congo, to test a newly built well. UMCOR's Water and Sanitation program is helping vulnerable communities gain better access to clean water by locating safe water sources, educating communities, and improving sanitation. UMCOR helps communities rehabilitate existing water infrastructure or build wells from scratch. UMCOR-supported water and sanitation projects in a dozen countries are helping thousands of people access safe water to meet their day-to-day needs.

Over the last decade that UMCOR has been involved in the Democratic Republic of Congo, improved water supplies and sanitation have been achieved for thousands of Congolese. Donor support has allowed UMCOR to deliver hygiene education as well as dig new wells, provide improved water carrying and storage capacity, and construct latrines in many places.

A Legacy of Service

Martha (Marty) McKnight learned the importance and joy of serving others early in life. She was born to Methodist missionary parents who were serving in Angola, then a Portuguese colony on the western coast of Africa. As a child, Marty witnessed her parents sharing the love of Christ as they provided medical care and educational ministry. People came from near and far to the Quessua hospital and boarding schools where her parents served.

As an adult, Marty was led to pursue missionary service with her husband, Ted. They served in Johannesburg, South Africa, where they met regularly with men from Mozambique who came to work in the gold and coal mines. Through the McKnights' efforts, the people they met with learned to read and write, studied the Bible and learned about church membership, as well as agriculture and hygiene. Though the McKnights have long since returned to the United States, their legacy of service is continued through financial giving to provide health care, literacy, and pastoral support that enhances life and continues to bring hope in Africa today.



Ted and Marty McKnight

Creating Your Legacy

A gift through your will or other estate plan lets you continue your support of Global Ministries and the United Methodist Committee on Relief (UMCOR) into the future.

A properly planned legacy gift offers potential tax and other financial benefits for your estate and/or heirs. It is important that you consider how such charitable gifts might impact your overall estate plan, so always consult your lawyer and other professional advisors when determining your legacy gift.

- **Make a bequest in your will or other estate plan.** When you make or update a will, you may include charitable bequests of a specific dollar amount, a percentage of what is left after other bequests have been made, or even a particular asset. You may be able to add a bequest to an existing will through a codicil or amendment.
- **Make Global Ministries and/or UMCOR the beneficiary of a retirement plan.** When you leave the balance of

an IRA or 401(k) to your heirs, they must carefully manage the account to avoid losing its tax-deferred status and potentially triggering large income taxes and possible penalties. You can simplify matters for your loved ones by directing all or a portion of what remains in your retirement accounts to charities and leaving other more tax-favored assets to your heirs.

Designating a charitable beneficiary of an IRA or 401(k) does not require you to change your will. It is important to check with your plan manager to make sure your current intent is reflected on your beneficiary designation.

- **Turn unneeded life insurance into a gift to Global Ministries and/or UMCOR.** You can also make Global Ministries and/or UMCOR the beneficiary of life insurance policies without changing your will. As your financial and family circumstances change over the years, you may have life insurance policies



Photo: Paul Jeffrey

Stephanie Birdwell (left) and Shannon Tiger clean up tornado debris at a destroyed home in Moore, Oklahoma. They are part of a team of UMCOR volunteers working out of First United Methodist Church in Moore. Through generous donor support, UMCOR is able to respond quickly to natural disasters when they occur while working closely with United Methodist annual conferences, local churches, and humanitarian partners to assess needs and determine a collaborative response that will help survivors recover over the long term.

"It has been rewarding to see the United Methodist churches working in their communities to offer hope and help to those affected by disaster and then to come alongside of them to say: 'you are not alone,'" says Greg Forrester, the head of the US Disaster Response unit of UMCOR. "The most important thing for us is to equip annual conferences and local churches so that they know what to do when disaster strikes."

that are no longer needed for their original purposes. They may make an excellent source for charitable gifts.

- **Trust arrangements allow you to give and receive.** Trusts can prove helpful for saving taxes, managing property, and/or distributing property, especially if the intended recipients are minors or others who are inexperienced at handling their own financial matters.

Trusts can also be used to provide income to you or a loved one for a period of time in a tax-advantaged way, while ultimately resulting in a gift to Global Ministries and UMCOR.

There are many ways to structure your gifts to maximize the benefits both to you and your loved ones. We are here to assist you as you consider your giving options.

BEGIN NOW

There is no time like the present when it comes to creating or updating your estate plans. Experience the peace of mind that can come from taking control of the future in ways that will benefit you, your loved ones, and Global Ministries or UMCOR.

We will be pleased to help you and your advisors as you consider the charitable dimension of your plans.

A Change for the Better

To create a bequest by will to Global Ministries or UMCOR, simply inform your attorney when you are creating or reviewing your plans. It is important to use the correct legal language in your documents. We would be happy to provide you with sample bequest language. Please contact Tonya Treble, major gift and planned giving officer, at (212) 870-3910.



Adam Shaw is a mission intern with Global Ministries serving in the human rights and conflict transformation ministry of the California-Pacific Annual Conference of The United Methodist Church. Prior to this assignment, he worked with Initiatives for Peace in Mindanao, a network of grassroots organizations promoting peace with justice in a region of the Philippines with a long history of clashes between government entities and workers' rights movements.

Adam says of his faith journey: "I grew up in the church; my parents were both missionaries, so I tagged along every Sunday to the church that my dad was working with at the time. My faith didn't get its own feet until I was in middle school and was baptized. My faith grew slowly, stagnated even, until my junior year in college when I rediscovered the essence of Christianity and faith." Adam's sense of mission includes an awareness that he is "called to trust, fear, worship, and delight in God ... I am called to be strong so that I may lend others my strength, to be wise, to guide others, to be humble so I can learn, to do the things God has planned for me."



Sonia Vargas-Maldonado is a United Methodist missionary with Global Ministries serving with the Santurce Cooperative Ministry of the Methodist Church of Puerto Rico. The Santurce Cooperative Ministry consists of a cluster of five congregations with ministries that assist the poor, the elderly, immigrants, the unemployed, and the homeless.

Sonia went on her first mission trip to Haiti and the Dominican Republic at age 17. "I was touched by this experience as I shared with girls as young as 18 months who were either orphaned or abandoned. This marked my life and my heart, and I learned to see the needs of others as I learned to see God's mercy and love. I also learned the importance of sharing the gospel and Jesus' love wherever we go."

Welcome Tonya Treble to Our Planned Giving Team

Global Ministries and UMCOR would like to welcome Tonya Treble as our new major gift and planned giving officer. Tonya has served as a member of the Global Ministries and UMCOR fund development team for two years. She assumed her new role earlier this year and looks forward to better connecting you with Global Ministries and UMCOR.



Tonya Treble

Originally from Indiana, Tonya grew up in The United Methodist Church and attended the Methodist-affiliated DePauw University for her undergraduate education. She earned her Master's degree in public affairs in nonprofit management from Indiana University and has nearly a decade of experience

helping nonprofit organizations better connect with their constituents and supporters.

Tonya and her husband continue to be inspired by the service of United Methodist missionaries and UMCOR responders on behalf of United Methodists everywhere. Having grown up on a family farm, Tonya was moved to support the ministry of United Methodist missionary Katherine Parker, who works to improve agricultural techniques and food security in Nepal. Tonya considers it a privilege to share with supporters the stories of life-changing work accomplished by United Methodists to alleviate suffering and share the love of God.

We hope that you will consider a legacy gift to help Global Ministries and UMCOR continue to grow the missionary community, disaster response, health, and development initiatives. Tonya is available to answer questions about the organization and to discuss estate-planning options. You can contact her by phone at (212) 870-3910 or by email at ttreble@umcmmission.org.

Need more information?

Global Ministries/UMCOR's major gift and planned giving officer serves all those interested in receiving more information about planned gifts to UMCOR and Global Ministries, and has booklets covering a variety of topics related to gifts and financial planning. These are available at no cost to our friends and supporters. Please contact Tonya Treble for more information, or use the enclosed reply card.

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The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. ©MMXIII RFSCO, Inc. All Rights Reserved. NQDX-13