

# WHY PLANNED GIVING?

Parishioners are able to ensure that the ministries they truly care about will continue to thrive.

## Gifts During Your Lifetime

### Gifts of Cash

Donations of cash can be deducted from your income if you itemize deductions.

### Gifts of Stock

You can donate appreciated stocks, bonds, and mutual funds. The Church Foundation can work with your brokerage at no additional charge to see stock and send the value to your church/organization.

### Qualified Charitable Distributions from an IRA, 401(K), or 403(B)

Once your retirement account distributions become mandatory you can have them paid directly to your church/organization. You can avoid any potential income tax liability.

### Donor-Advised Funds

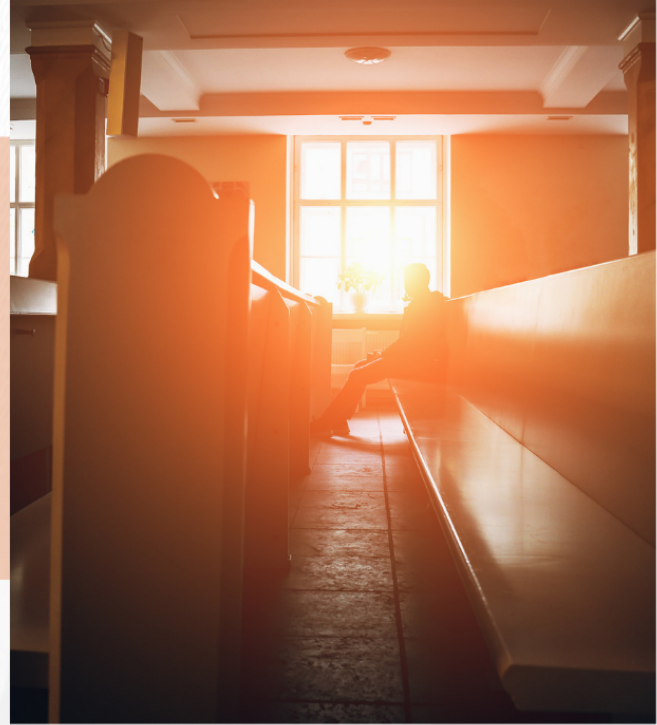
Set up a charitable fund that allows you to set aside your gift now. Decide in the years ahead which charities you would like to support.

### Charitable Remainder Trust

Similar to Donor-Advised Funds however you can receive income from the trust for your lifetime as annuity or fixed percentage. Upon your death, the remainder goes to the charities you selected.

### Other Gifts

- Securities
- Real Estate
- Personal Property
- In-Kind Gifts



## Gifts Through Your Estate

### General Bequests

You can name a church/organization as your beneficiary in

- Your Will or Trust
- Financial Accounts
- Home with a beneficiary deed

### Retirement Accounts

- You can name the church/organization as partial or complete beneficiary to your IRA or 401(K)
- This reduces the tax liability and frees up other assets

### Life Insurance Policies

- You can make the church/organization partial or complete beneficiary



## The Church Foundation

STRONG FOUNDATION. FAITHFUL INVESTING.

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