

Create a Legacy

5 Ways to Make a Personal Gift

Outright Gifts The simplest way to participate is to make a gift during your lifetime. There are tax advantages for such gifts. Some examples of these gifts are cash, securities, charitable gift annuities, and real estate property such as a house or land.

Request by Will This is a simple way to fill the void when you depart by including the Endowment Fund in your will. Such a bequest may have important tax benefits for your estate. A bequest can be created with a statement in your will, "I give 10% of my adjusted gross estate to the Endowment Fund of Swiss United Church of Christ, New Glarus, Wisconsin."

Life Insurance The Endowment Fund can be named the beneficiary of your life insurance policy. The premium you pay may be tax deductible.

Creation of a Charitable Trust Trusts, either living or under a will, can be written to cover many situations. They can provide for your financial needs, those of designated others, and eventually pay the principle or income to the Endowment Fund.

Charitable Gift Annuity A charitable gift annuity allows you to make a gift, yet receive an income from the gift principle as long as you live. Upon your death, the principle then becomes a gift to the Fund. Gift minimums are \$1,000.

___ I would like to speak to someone about the Swiss United Church of Christ Endowment Fund and opportunities for legacy giving.

___ I have included Swiss United Church of Christ in my will, trust or other estate plans.

Name: _____

Address: _____

Email: _____

Telephone: _____

Please return or mail your request to the
Planned Giving Committee
PO Box 97
New Glarus, WI
53574



SWISS UNITED CHURCH
OF CHRIST





A Meaningful Legacy Honoring **Faith | Community | Charity**

Since 1849 Swiss United Church of Christ has ministered to the needs of the people of New Glarus and beyond. Whether it is through worship, Christian fellowship, or community outreach, Swiss United Church of Christ plays an important role in the community and in the lives of many families. To insure that future generations also may benefit from the ministries provided by church, the congregation established the Endowment Fund on March 18, 1990 as a vehicle to create an ongoing legacy of support to Swiss Church.



What is the Endowment Fund?

The word “endow” means to enrich. The purpose of an endowment is to enrich the body of Christ through the faithful stewardship and recognition of all the gifts that God has given us. The Endowment Fund exists, therefore, to enrich the mission of Swiss United Church of Christ and to assist in the support of its financial viability for the future through the receipt of planned gifts including bequests, wills, trusts, life insurance policies, IRAs or retirement plans. **Whatever your wishes, it is best to consult an attorney or financial advisor for assistance.**

Who administers the Endowment

Fund? A committee of five church members administers the Endowment Fund as the Planned Giving Committee. The congregation elects the committee members to a three-year term. The Senior Pastor and the President of the Consistory serve as advisory members to the committee. The committee reports to the Consistory.

How is the Endowment Fund Invested?

All resources designated to the Swiss United Church of Christ Endowment Fund are invested in an account that has been established with the United Church Foundation, Inc. for the purpose of monitoring and growing longer term gifts. The Foundation manages the funds of many UCC churches, conferences of the UCC, and the retirement plans for many pastors.

How is income from the Endowment Fund invested?

As the gifts are considered permanent assets, all principle amounts will be retained with only the income generated from such fixed assets being available for distribution. Income from the Endowment Fund is distributed annually by the Swiss Church Planned Giving Committee with final approval from the Consistory. Historically, Endowment Fund resources have supported property acquisition debt, benevolent interests, innovative ministries, higher education and capital improvements.