

**The gift will be funded by
(please indicate below):**

- Outright gift
- Will or living trust
- Charitable remainder trust
- Retirement plan/IRA/401(k)
- Life insurance policy
- Donor advised fund
- Other

**The amount to the Valley
UMC Foundation will be:**

_____ US\$
(the anticipated amount is necessary to
determine recognition.)

Signature Date

Signature Date

**Remember to consult an
independent tax and/or legal
adviser before making any gift.**

Return this form and any supporting
document(s) you wish to share to:

**Valley UMC Foundation
% Valley United Methodist Church
4201 Ashworth Road
West Des Moines, IA 50265**

Recognizing your Generosity:

When you have completed your estate
plan, please let the Valley UMC Founda-
tion Chair know so we may properly
thank you.

Your commitment to the legacy of Val-
ley United Methodist Church through
your gift to the Valley UMC Founda-
tion is appreciated. We would like to recog-
nize your generosity by giving you a per-
sonalized certificate and a special pin
to wear. We may also include your name
on a list of benefactors.

*Church Benefactor-Level One
\$1000-\$49,999*

*Church Benefactor-Level Two
\$50,000-\$99,000*

*Church Benefactor-Level Three
\$100,000 and over*

If you would like to opt out of one or
both of these items, please indicate this
below:

- Please do not list my name in any
public document
- Please do not send any recognition

*CREATING
YOUR
LEGACY
FOR
THE
VALLEY
UMC
FOUNDATION*

Remember, what you do
today makes a difference for
tomorrow. Make a difference
and start your personal legacy
by making a gift to the

Valley UMC Foundation

in your estate plan today!

VALLEY UMC FOUNDATION

Tomorrow's church depends on what actions we take today!

Promote a continuing church beyond your lifetime by including Valley UMC Foundation in your estate plan. Your gift will be invested and the earnings used to support the educational and missionary efforts as well as the facilities of the church. You are invited to join those who have already committed to enriching the life of the church through a gift to the Valley UMC Foundation. The Foundation can make a real difference in the future of the church and a gift from you or your estate can provide ongoing financial support to ensure that future.

How to include the Foundation:

You can include the Valley UMC Foundation in your estate plan in many ways — most commonly by making an outright gift today, by making a gift in a will or adding to a will by a document known as a codicil. Alternatively, you might choose to make the Valley UMC Foundation the beneficiary of a retirement plan or insurance policy.

Here are a few examples of language for you and/or your financial adviser to consider:

- For a general gift of a certain percentage proportion of the estate:

"I give to the Valley UMC Foundation one-fourth of my property."

- For a gift of a specific asset:

"I give 500 shares of 'ABC' stock to the Valley UMC Foundation."

- For a contingent bequest, which takes effect only upon the meeting of certain condition:

"In the event my spouse does not survive me, I give to the Valley UMC Foundation \$_____."

- For a residual request, which directs all or portion of whatever remains after all other required amounts are paid:

"I give the rest, residue, and remainder of my estate to the Valley UMC Foundation."

Yes, I/we have made a commitment to the Valley UMC Foundation in my/our estate plan.

Name(s) as you would like to appear on recognition

Address

City, state, zip

I/we designate that the spending portion of the gift to the Valley UMC Foundation will be applied:

_____ At the Director's discretion (Undesignated)

_____ To the Scholarship Fund

_____ To the Sue and Walter (Bud) Potts Mission Fund

_____ To the Capital/Improvement Fund