Circuit Rider Dispatch

Holston Conference of the United Methodist Church Foundation, Inc.

GIFT ANNUITY THAT BENEFITS YOU AND YOUR CHURCH

When we explain what a gift annuity can do for our donors and the local church they wish to support often people ask us if this is legal! Especially when one considers, for example, a fixed rate of 5.8% for a 75 year old

donor and nearly 80% tax-free income payments for the life of the donor.

A gift annuity through the Holston Conference Foundation is a winwin for the donor and the church or the donor's favorite ministry as the remainder of the invested gift is directed by the donor.

For a complimentary and detailed personalized proposal for you (and information for your professional advisor) please click <u>here</u>.



You may be amazed at how an asset that you have been holding on to as an investment can do so much good when turned into a charitable gift annuity!

(For a more detailed brochure on gift annuities with the Foundation please click <u>here</u> to find your age bracket and your possible rate of return.)



SAVVY LIVING Understanding Reverse Mortgages: Beware of Misleading Ads

Can you give us a rundown of how reverse mortgages work? I've seen well-known actors pitching them on TV and they sound like a good deal. What can you tell me? Read More

PERSONAL PLANNER Wills - Good and Bad

More than 40 wills were submitted to the probate court, with a multitude of potential heirs each claiming to be the true recipient of a wealthy business owner who passed away in 1976. <u>Read More</u>

YOUR PLAN Lucy Scroggie

Lucy Scroggie passed away on November 11, 2007 at age 72, but this year she will feed hungry... Read More

WASHINGTON NEWS Candidates Debate over Tax Proposals

In the CNBC debate on October 28, ten Republican Presidential candidates responded to questions on their tax proposals. <u>Read More</u>

FINANCES Stocks - Apple Reports Record Earnings <u>Read More</u> Bonds - Fed Policy Statement Causes Selloff <u>Read More</u> CDs and Mortgages - Interest Rates Remain Mostly Unchanged <u>Read More</u>

EASY TRANSFER OF STOCK

The Holston Conference of the United Methodist Church Foundation, Inc. can be of assistance to local churches or individuals in processing gifts of stocks or other publicly traded securities. As long as the ultimate beneficiary of the gift is a United Methodist or Holston Conference affiliated or supported charitable institution, program, etc., the Foundation can process these gifts for the donor, regardless of whether the agency or program maintains an active account or endowment with the Foundation.



Click <u>HERE</u> for a form or contact Brenda Mills by clicking <u>here</u> for more information.

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