

Circuit Rider Dispatch

Holston Conference of the United Methodist Church Foundation, Inc.

CHARITABLE GIFT ANNUITY PROVIDES INCOME FOR DONORS FOR LIFE, SUPPORTS CHURCH PERPETUALLY IN DEATH

Edna "Major" Hackney and Harry Pease were both born in Cohutta, Georgia, where their dads both worked for the railroad. Major and Harry first met in grammar school, before her family moved to Dalton. That is where she first got involved with the Methodist Church. Major became a nurse and Harry graduated from Georgia Tech with a degree in Textile Engineering before his Army service in the Pacific Theater in WWII.

After the war, Major and Harry found each other again and married in 1947. Later they moved to Loudon, Tennessee, where Loudon UMC became their permanent church home. Major was president of the United Methodist Women and a member of the Deborah Circle and known for her generous baked goods and quiet service. Harry ran the local hosiery plant and if he really liked you...you just might receive a gift of socks.



The Pease's were interested in not only supporting their church but also providing income for their retirement years. After reviewing the options, they funded a charitable gift annuity.

Harry passed away last year in May and Major died last Christmas Eve. As a result of their generosity and careful planning, The Mr. & Mrs. Harry Pease Building & Maintenance Endowment, funded by the charitable gift annuity, will permanently support the church that they so deeply loved. The Pease's were humble, quiet, generous people and their legacy will not be forgotten.

If you are interested in learning more about how a gift can help fund your retirement years and support your local church, <u>please contact us</u> at the Foundation. We would love to discuss your options, tax benefits and help you leave a legacy for others.



SAVVY LIVING How to Find and Choose a Doctor

What resources can you recommend to help me find and research some doctors in my area? I'm looking for a good primary care doctor or internist for my elderly parents and I need to locate a good orthopedic doctor for me. <u>Read More</u>

PERSONAL PLANNER Who Will Receive Your Property?

"Who should receive my property?" asked Helen to her attorney, Clara. "There are so many decisions to make. Since Morgan passed away, I need to make these decisions myself. <u>Read More</u>

YOUR PLAN Patricia V. Timberlake

Patricia (Pat) V. Timberlake was quite a special lady. She was a devoted pastor's wife... Read More

WASHINGTON NEWS IRS Progress on Identity Theft

In a May 28 report by the Treasury Inspector General for Tax Administration (TIGTA), the IRS showed reasonable progress in efforts to combat identity theft. <u>Read More</u>

FINANCES Stocks - AutoZone Reports Mixed Earnings <u>Read More</u> Bonds - Treasury Yields Fall <u>Read More</u> CDs and Mortgages - Interest Rates Rise <u>Read More</u>

Did you Know?

Our website, <u>Holstonlegacy.org</u>, offers a Planned Giving Calculator for individuals to select their incomeproducing gift plans. By clicking here you can run various illustrations on the income and tax benefits for a unitrust, annuity trust, gift annuity, deferred gift annuity, sale and unitrust or gift and sale.

If you have questions about the illustrations or would like for someone to visit with you to discuss including your local church or favorite United Methodist-related ministry in your estate plans, please give us a call at 865-690-8124 or click <u>here</u> to send an email. We look forward to serving you.

Gift Annuity

Benefit from excellent fixed payouts that are partly tax free plus charitable tax deduction. RUN ILLUSTRATION

Annuity Trust

Receive high fixed payments with tax free sale plus charitable tax deduction. <u>RUN ILLUSTRATION</u>

Deferred Gift Annuity

Benefit from fixed payouts beginning at a date more than one year from the gift. RUN ILLUSTRATION

Part Gift and Part Sale

Enjoy substantial cash and save 50%, 70% or even 100% of tax on gain. <u>RUN ILLUSTRATION</u>

Sale and Unitrust

Receive cash plus increased income from trust! Charitable tax deduction reduces tax on gain. RUN ILLUSTRATION

Unitrust

Enjoy increased income with tax free sale plus charitable tax deduction. <u>RUN ILLUSTRATION</u>

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