



Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.

This week I have the opportunity to serve on jury duty. I remind myself as I sit in the courthouse each day that this "privilege" is because we live in a democratic country and a trial by a jury of our peers should not to be taken for granted.

As an American I also share the legal right to create my own last will and testament directing my assets (meager as they may be) to my loved ones and even charity. In my line of work I find how unfortunate it is that so many people do not take advantage of this right as a citizen of one of the greatest nations as they often believe that estate planning is only for wealthy people. People at all economic levels can benefit from a self-directed estate plan. Upon death, an estate plan legally protects and distributes property based on your wishes and the needs of your family and/or survivors with as little tax as possible.

A will is the most practical first step in estate planning; it makes clear how you want your property to be distributed after you die. To download a helpful brochure on creating a will click [here](#).

The purpose of a will is to transfer your assets to loved ones or to charitable organizations after your death. If you don't have a will when you die, your estate will be handled in probate, and your property could be distributed differently than what you would like. Writing a will can be simple or complex depending upon one's assets. We encourage you to seek the advice of a professional advisor.

To assist you in getting your affairs in order, regardless of your age, the Holston Foundation created the *Personal Information Record Book*. It is available for free by clicking [here](#). We even have available for you very helpful information on understanding what a will can and cannot do as well as a "planned giving calculator" that can be found by clicking [here](#).



As a reminder, Roger Redding and I are available to speak to your church committee, congregation or other United Methodist-related board on policies, planned giving or stewardship issues in general.

I look forward to seeing you soon-hopefully not this week at the courthouse!
Paul Bowman



SAVVY LIVING

Personal Tech Products Designed Specifically for Seniors

Can you recommend any tablets, smartphones or computers that are specifically designed for seniors? I would like to buy a device for my grandmother so she can keep up with her grandkids better, but the device needs to be simple to use. [Read More](#)

PERSONAL PLANNER

Bequests to Your Favorite Charity

Bequests to charity are the most popular type of planned gift. A donor may retain assets during life and then leave a bequest to a charity. [Read More](#)

YOUR PLAN

[Earl & Conchita Blazer](#)

Some would describe it as love at first sight! Conchita met her... [Read More](#)

WASHINGTON NEWS

[IRS End-of-Year Tax Tips](#)

In IR-2014-110, the IRS offered tax tips for end-of-year charitable giving. [Read More](#)

FINANCES

[Stocks](#) - Hewlett-Packard Continues Resurgence [Read More](#)

[Bonds](#) - Treasuries Rise on Mixed Economic Data [Read More](#)

[CDs and Mortgages](#) - Interest Rates Stay Low [Read More](#)

YEAR END GIFT OPTION:

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 [HERE](#) for a form or contact Brenda Mills by clicking [here](#) for more information.



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