



# Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.

## Checklist for the New Year

As we close out another year The Holston Conference Foundation invites you to pause and reflect on 2014 as well as to also plan for great things to come in 2015. Both churches and people can benefit from a review of accomplishments and challenges as we resolve and plan actions in the year ahead.

Below you will find a simple checklist for both individuals and churches related to estate planning and the management of designated gifts to churches. We hope that this helps you as you consider your own financial affairs or serve on a church committee. The Holston Conference Foundation has [free resources and tools](#) to help people and churches review and plan for a better future.

If we can be of further assistance please contact the Holston Conference Foundation at 865-690-8124 or by clicking [here](#). As a reminder, Roger Redding and Paul Bowman are available to speak at your church, share strategies/policies with a committee or even meet with individuals to confidentially plan an estate strategy that benefits the local church or other United Methodist-related organizations.

### Checklist for Individuals

- Review your current will or trust (if any) and consider any changes in the people, plans, and purposes that your plan provides for.
- Make a written record and inventory of the contents of a safe deposit box and all important papers. Give a copy to a trusted family member or personal representative.
- Review all beneficiary designations or IRA's, retirement plans, and life insurance policies to make sure they are current.
- Review your durable power of attorney for healthcare and living will.
- If you have dependents, make sure you are comfortable with the guardian named for your children or a loved one who is disabled.
- Review your investments, bank accounts, and other financial assets. Are your funds working for you? Are costs appropriate?
- Consider adding your church or favorite ministry to your estate plan as part of your legacy.



## Checklist for Churches

- How are our restricted accounts and special funds invested? Are they in compliance with the Socially Conscious Standards of the church? Are the returns supporting our mission and ministry?
- Are gift acceptance policies in place?
- Is the church sharing information on legacy giving through wills and estates?
- Are spending policies in place to help us use endowments, scholarships, and other special purpose funds?
- Do we accept and promote the opportunity to receive gifts of stock or other non-cash assets?

**We hope you have a happy, healthy and prosperous 2015.**



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### SAVVY LIVING

#### How to Appeal When Medicare Won't Pay

How do I file an appeal when Medicare won't pay for something that has been covered in the past? [Read More](#)

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### PERSONAL PLANNER

#### Income for Surviving Spouse

Elliot and Alexis were concerned about planning for the future. They had built a substantial estate of \$1,200,000. When Elliot was 70, he rolled over his \$400,000 qualified [Read More](#)

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### YOUR PLAN

#### Bobby Lee Collier

Bobby Lee Collier was an art teacher whose creativity bloomed not only... [Read More](#)

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### WASHINGTON NEWS

#### White House 2015 Tax Proposals

At a press conference on December 19, President Obama was asked about potential tax reform in 2015. With language similar to the hopeful statements on tax reform by Senate Majority Leader Mitch McConnell (R-KY) and Speaker of the House John Boehner (R-OH),... [Read More](#)

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### FINANCES

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**CDs and Mortgages** - Interest Rates Rise Slightly [Read More](#)

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