



Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.

Holston Conference Foundation Announces 2014 Grant Deadline

The Holston Conference Foundation stewards nearly 200 special-purpose endowments, scholarships and program grants established by individuals, families, and friends that support specific ministries, churches, and institutions.

Grant Application Deadline is April 30, 2014.

These funds are governed by documents put in place by generous donors and overseen by a Grant Committee made up of members of the Foundation's Board of Directors and other volunteers who carefully review applications and evaluate priorities established by the donor.



Applications can be found by clicking [here](#). Please print and return to:

Holston Conference Foundation
P.O. Box 900
Alcoa, TN 37701

The majority of the Foundation grants furthering United Methodist ministries were established through estate planning by thoughtful individuals who wished to leave a positive legacy. Should you wish to discuss establishing a fund through a testamentary gift from your estate please contact Paul Bowman or Roger Redding at 865-690-8124.



PERSONAL PLANNER

Gifts with Life Income

Planning for retirement and senior care is a very important activity. The activities of daily living for a senior person include eating, dressing, bathing, walking and moving.

[Read More](#)

SAVVY LIVING

Health Strategies for Preventing Alzheimer's Disease

Are there any proven strategies to preventing dementia? My 80-year-old mother has Alzheimer's which has me wondering if there is anything I can do to protect myself.

[Read More](#)

YOUR PLAN

Henrietta Pugh

The way Henrietta Pugh lived her life was a true testament to her positive attitude, selflessness... [Read More](#)

WASHINGTON NEWS

Average IRS Refund of \$2,917

The IRS has recently published an update for 2013 tax return results as of March 14, 2014. The average refund for 2013 taxes is \$2,917. This is up from the average refund of \$2,863 for the prior year. [Read More](#)

FINANCES

Stocks - Adobe is on Cloud Nine [Read More](#)

Bonds - Treasury Yields Rise on Fed Outlook [Read More](#)

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

PLANNED GIVING OPTIONS AND DONOR BENEFITS			
YOUR GIFT	YOUR GOAL	HOW IT WORKS	YOUR BENEFITS
BEQUEST CREATING/BENEFITING AN ENDOWMENT OR NON-ENDOWED FUND	Maintain control of your assets during life Make a gift to charity at your death	You designate our church as the beneficiary of your asset by will, trust or other instrument.	Estate tax charitable deduction Life use and ownership of your property
CHARITABLE GIFT ANNUITY (CGA) MANAGED BY THE HOLSTON CONFERENCE FOUNDATION	Receive fixed income for life Avoid capital gains tax on the sale of your appreciated property Enjoy the benefit of tax savings from a charitable deduction	You transfer your cash or appreciated property to our church in exchange for our promise to pay you fixed income (with rates based on your age) for the rest of your life.	Charitable tax deduction Fixed income for life Partial bypass of capital gain Possible tax-free payments
CHARITABLE REMAINDER TRUST (CRT)	Transfer your appreciated property without paying capital gains tax Enjoy regular income for life or a term of years Receive the benefit of tax savings from a charitable deduction	You transfer your cash or appreciated property to fund a charitable trust. The trust sells your property tax-free and provides you with income for life or a term of years.	Charitable tax deduction Income for life or a term of years Possible income growth over time Avoidance of capital gains tax
RETIREMENT PLANS IRA, 401-K, 403-B, ETC.	Avoid possible additional taxes paid at your death. Retirement plans may push the estate value beyond the federal or state exempt amount.	Request a beneficiary form from the custodian of your plan.	Avoid having non-spousal heirs pay income tax on distributions from your retirement plan. A large portion of the retirement plan may be dissipated by the combined burden of estate and income taxes.
LIFE INSURANCE PLANS (TERM AND WHOLE LIFE)	Make a gift to your church or favorite charity using an existing policy you no longer need.	Contact your insurance agent and change the beneficiary to your church or the Foundation. You will also receive and income tax deduction if the ownership of policy (not term) is changed.	A gift of whole life insurance that is paid up is a current charitable income tax deduction with tax savings that may be spread out over six years. You also have the satisfaction of knowing that your policy proceeds are going to benefit a worthy cause.
REAL ESTATE	Simplify your estate Avoid capital gains tax Provide income from a trust	Transfer real estate to the Foundation outright or fund a charitable trust	Enjoy an income tax deduction and avoid capital gains tax Provide income from trust

For more information on any of the options above, or to request a personalized illustration for you or your tax advisor please contact Paul Bowman at paulbowman@holston.org or call 865-690-8124

Holston Conference of the United Methodist Church Foundation, P.O. Box 900, Alcoa, TN 37701

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