



## Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.

### The End is Near

Hard to believe 2016 will be gone before we know it! For those who wish to make a charitable gift of appreciated assets for tax purposes or to fulfill a pledge we invited you to consider the following:

- IRA Charitable Rollover is now permanent — Persons age 70½ or older can rollover up to \$100,000 from their IRA to a qualified charity. This can lower your income and taxes.
- Outright Gift of an Asset —make a gift of stock, real estate or another asset, avoid paying capital gains tax on the transfer and receive a tax-saving charitable deduction. The Foundation receives and sells stocks from individuals and forwards the amount to the charity or church of the donor's choice.
- Donor Advised Fund (DAF) — make a tax deductible gift to a DAF, which gives you the ability to make grants to your church or favorite ministries this year and in future years. This allows you to receive the charitable deduction now, but distribute charitable gifts at a later date. The Foundation can assist you with the process.
- Zero-Tax Gift and Sale — make a gift of part of an investment or property you intend to sell, avoid paying capital gains tax on the sale and receive cash back.



We work with individuals in any of the above options regularly assisting them in making tax-wise gifts to ministries and their local church throughout the Holston Conference. If we can assist you please contact us by clicking [here](#) (email) or calling 865-690-8124.

Paul J. Bowman  
Director of Gift Planning

**GIVE  
AND  
RECEIVE**

Click [here](#) to receive  
a brochure about  
Gift Annuities.



#### SAVVY LIVING

##### How to Find and Hire a Good Handyman or Contractor

What's the best way to find a good handyman or tradesman to do some work around the house? I've had some bad luck lately with unprofessional workers who do shoddy work and charge too much. [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. [Read More](#)

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## YOUR PLAN

### Walter Minnick

Walter Minnick grew up the way that most people did around the... [Read More](#)

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## WASHINGTON NEWS

### Success in Opposing Tax Impersonators

Sens. Susan Collins (R-ME) and Claire McCaskill (D-MO) are the Chairman and Ranking Member of the Senate Aging Committee, respectively. Both have strongly encouraged the federal government to protect seniors by prosecuting tax impersonators. [Read More](#)

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## FINANCES

**Stocks** - Apple Sales Fall [Read More](#)

**Bonds** - Treasury Yields Rise [Read More](#)

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

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## TAX SAVINGS WORTH A SECOND LOOK

Low-performing stocks that have outlived their usefulness to you.	Update your portfolio by selling stocks that have lost value. Balance losses with gains from other stocks.
Real estate you are tired of holding.	Give that real estate (or part of it) to the Foundation. You lose the burden of maintaining and paying taxes while gaining income tax advantages.
A business ownership where you wish to reduce your share.	Donate a share of your closely held stock to charity. You receive an income tax deduction and reduce your ownership.
High-performing stocks you wish to sell but that would result in steep capital gains.	Transfer (never sell) your stock to us to fund a charitable gift annuity or charitable remainder trust. Receive income for life as well as tax benefits.
Provide for your children.	Use almost any asset you have to establish a charitable remainder trust. Your children receive income for life. You receive tax advantages (plus possible estate tax benefits) while establishing an endowment for a cause you support.

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