

PLANNED GIVING BRIEF



Creative LEGACY OPTIONS

In addition to your will, which is the foundation of your plan, there are other creative options. We can show you the benefits of a gift annuity that gives you tax benefits now with fixed payments for life. There are also a variety of trusts, beneficiary designations and other tools that can help you achieve all your goals and wishes. Planning is not just about things. It gives voice to your values and continues the love and care that has exemplified your life.

OUR TOOLS ARE FREE AND WE ARE JUST A CALL, CLICK OR EMAIL AWAY.

To learn more about creative ways to benefit you and the mission of The Orchard and Open the Bible, please contact us.



VALERIE HOGAN
EXECUTIVE DIRECTOR
ORCHARD MINISTRY
DEVELOPMENT

SPOTLIGHT
ON GIFT TYPE

5 Reasons
to Give Real Property

1. No more real estate taxes.
2. No more cost of ownership (maintenance, insurance, upkeep) or hassle of selling.
3. Unproductive land can be put to a higher use.
4. Property can be used for a purpose you believe in—immediately.
5. Property can be transferred to a trust or gift annuity for added benefits.

PROPERTY THAT MAKES
A GREAT CHARITABLE GIFT:

- House or Condominium
- Farmland & Undeveloped Land
- Commercial Property
- Timberland
- Vacation Home



Stewardship, Generosity
& Faith
IN UNCERTAIN TIMES

WE HAVE RECENTLY BEEN THROUGH plenty of uncertain times, and there appears to be a continuation of that on the horizon. How do we steward our resources and continue in biblical generosity in such times?

Pressing on in uncertain times is a matter of faith, due diligence, and leaning into God and his advice though his Word. We are given many examples of faith in uncertainty in Scripture. Some examples are Peter's leap, the widow's mite, even the Israelites' entering the Promised Land. Each took bold steps in the direction of obedience without knowing the exact future or outcome. Many times, all we can do is our best due diligence, together with a whole lot of faith and persistent obedience to what God has asked us to do.





MAKE SURE YOUR ESTATE PLAN HONORS YOUR LIFETIME OF VALUES, LOVE AND FRIENDSHIP.

Fall Cleanup SETTING OUR PLANS IN ORDER

Fall Cleanup END OF YEAR GIVING PLAN



✓ IRA Charitable Rollover

Congress made permanent the law that allows people age 70½ or older who own an IRA to make cash gifts directly from their IRA to charity. For many people, this is the best tax-wise way to give. An IRA rollover gift will not be included in your taxable income and may qualify for your required minimum distribution.

✓ Outright Gift of an Asset

If you wish to make a gift to support the Kingdom this year but are concerned about preserving your cash resources, consider a gift of an appreciated asset. A gift of securities, business interests or real estate can provide you with significant income and capital gains tax savings, often exceeding the benefits of a cash gift.

✓ Donor Advised Fund (DAF)

If you are looking for an end-of-year deduction but want more time to make thoughtful giving decisions, consider a donor advised fund (DAF). You can use your tax deductible gift to establish a DAF in your name. You can make grants from your DAF now and in the future to support our work and other causes you care about.

✓ Tax-Advantaged Gift Then Sell

If you are planning to sell an asset like securities, real estate or a business, before you sell, consider a charitable gift then sell. By making a gift of part of the asset before the sale, you may be able to use a tax-saving charitable deduction to significantly lower or eliminate the capital gains tax on the sale.



Why do we talk about Wills and Trusts at church? Consistently, about 60% of the population has no will, trust or end-of-life written instructions for those that remain behind them. This is the case even with believers. We believe that this is not excellent stewardship and can be addressed without much difficulty. Making a concrete (but changeable) plan and leaving instructions for those we leave behind is a loving thing to do. We can prevent months in a probate court system and thousands of dollars.



This ministry guided me in drawing up my important documents and I'm so grateful for their help, as I don't have expertise in this area. It's a huge relief knowing the documents were done properly. I'm a missionary and couldn't afford a lawyer, so this too, was a great benefit for Orchard people like me. Highly recommend and encourage you to take advantage of this seminar.

~ Ginny Feldmann

The good news is planning your legacy is rewarding and fulfilling. No one with a plan regrets having one. Take time now to write your will or trust or revise it. Your legacy can reward and affirm your lifelong commitment and investment in the family, people and Kingdom causes important to you.

We can assist you in contemplating a plan that works for you. Visit our website, or email or call us.

