

GIVING METHOD COMPARISON | YOUR GIFTS. FOREVER INVESTED.



Gift	Bequest	Cash	Securities	Retirement Assets, e.g. 401(k)	Life Insurance	Charitable Lead Trust	Charitable Remainder Trust	Charitable Gift Annuity
Goal	A gift through your will or revocable trust enables you to provide significant support when you no longer require the asset.	Straight-forward and simple gift.	An outright gift of securities, providing generous charitable support while reserving tax benefits for you.	Now: Transfer a charitable IRA distribution directly to St. Andrew. Later: Make St. Andrew the beneficiary of your retirement accounts.	A generous gift to St. Andrew with a policy that may no longer be needed.	A generous gift of income payments for a set period of years (often 20 years) after which the assets are transferred back to the grantor or heirs.	An irrevocable gift to a trust that provides you a fixed or variable income for life or a set term. At termination, the residual goes to St. Andrew.	An irrevocable gift that provides you or your loved ones a regular fixed payment for life. After your lifetime, St. Andrew receives the residual value.
How To	Name St. Andrew in your will or living trust. You can choose a percentage or specific value.	Simply write a check or make a donation.	Transfer stock or other securities directly.	Work with the Church and your advisors to transfer now or change your beneficiary designation.	Change ownership or name St. Andrew as beneficiary of a paid up policy.	To establish a lead trust, be certain to work with a reliable, experienced estate attorney.	Establish a charitable remainder trust and name a trustee.	Establish a charitable gift annuity contract with the Texas Methodist Foundation.
Amount	No minimum	No minimum	No minimum	No minimum	No minimum	Minimum \$200,000	Minimum \$100,000	Minimum \$10,000
Your Benefit	(1) Your generous support. (2) Retain asset for use during your lifetime. (3) Fully deductible for federal estate taxes.	(1) Your generous support. (2) Immediate income tax deduction.	(1) Your generous support. (2) Federal income tax deduction. (3) Avoidance of long-term capital gains.	(1) Your generous support. (2) No estate or income taxes for St. Andrew. (3) Heirs could encounter both income and estate taxes.	(1) Your generous support. (2) Potential income tax deduction.	(1) Your generous support. (2) Income to the Church for a set period. (3) Removes trust assets from estate. (4) Assets go to heirs with little tax. (5) No deduction.	(1) Your generous support. (2) Fixed or variable income. (3) Income tax deduction. (4) Reduce taxable estate. (5) Can change beneficiary.	(1) Your generous support. (2) Tax benefits. (3) Higher income than CDs or Treasuries. (4) More stability than equities.