



Legacy Giving

STEPS TO A LEGACY GIFT



STEP 1: LEARN

WHAT PLANNED GIVING REALLY IS:

As you plan your gift, please know that planned giving is far more than a transaction, it is...

Opportunity for you who care so deeply for this church and want to continue energizing this mission and its ministries, even after your lifetime.

The gift of a lifetime for you who are using your assets fully today – like your financial, personal and real assets. After our lifetime, when we pass along those remaining assets, most of us have the opportunity to make the largest and, therefore, the most impactful gift of our lives.

Leadership for you whose generous decisions and actions have been witnessed by others. Your planned gift teaches others to re-deploy the resources they have to lift up others - during their lifetimes and after.

We are grateful to those who came before us for all of the ministry that they have made possible. Now we are entrusted to ensure that it thrives in brand new ways for those who come next.



STEP 2: DESIGN YOUR GIFT

Planning your gift may enable you to send more to ministry or to protect more future value for you and your family. Here are some of the more common gifts that you might consider:

BEQUEST: Make a gift after your lifetime through your will or trust. This can be a fixed dollar amount, a specific asset, or a percentage of your estate.*

RETIREMENT ACCOUNT: IRA's, 401(k)'s and other retirement accounts can be the most heavily taxed asset in many estates. Choosing this as your gift might leave your less task-burdened assets to your loved ones.*

CHARITABLE TRUST: Trusts can combine flexible benefits including a generous income, tax benefits and a powerful gift to the church.*



* **Caring for estates and assets often requires help.** In order to make sure a particular planned gift fits your situation, we suggest that you consult with your professional advisor on how this gift would fit into your plans.

STEP 3: IMPACT THE FUTURE

Our church has served as our congregation's home for worship, for fellowship and for doing ministry both here and in our community.

This was started by many who came before us; and now is our opportunity to plan for those who come next.

Making a planned gift will prepare and equip future generations to continue our vital ministry, bringing them the opportunity:

- To adapt to teach the next generations
- To tend and care for this place as our cherished church home, and
- To reach out seeking new ministry opportunities that we cannot forecast today.

Through a legacy gift, you can still work here even after your lifetime. By providing a legacy gift, you can continue to be Christ's hands in the world – through this congregation.



STEP 4: SHARE GENEROSITY

Sharing that you've planned a legacy gift – and why – can amplify the power of your gift.

Share the news of your gift with the church. Here are several benefits of doing so:

- So that your gift gets to work efficiently. When the church knows of your gift, your gift is far more likely to avoid common and avoidable barriers and delays in being implemented.
- So that we may understand your wishes to ensure your future intentions are honored.
- So that others may witness your joy and be inspired to explore their own pathway to such a gift.
- So that we at the church may express our heartfelt gratitude for your generosity and thank you properly for lifting the future of our church.

JOIN THE LEGACY SOCIETY

The church introduced the Legacy Society to recognize individuals or families who have named the church as a beneficiary in their will, trust, life insurance policy or other testamentary gift plan. These generous gifts ensure a bright future for future generations.

For more information, please contact:



Jim Serum

610-793-1920 or jwserum@gmail.com

First Presbyterian Church

130 West Miner St., West Chester, PA 19382

Phone: 610-696-0554 Email: office@firstpreswc.com

