

# Why have an endowment fund?

## Endowment funds can:

- Enhance ministry/outreach.
- Help care for facilities.
- Encourage us to be better stewards.
- Provide a vehicle for giving.
- Pass your faith values to the next generation.

## Endowment funds provide donors an opportunity to:

- Make a permanent gift from lifetime assets.
- Provide on-going support for a favorite ministry.
- Leave a legacy that will be remembered over time.

## Endowment funds say: We believe...

- in the future of *our church*
- that what we have is a *trust from God*
- in building a *sense of permanence* in what we do
- in being *good stewards* as a church family
- in *providing ministries* that were once only dreams
- in *passing our faith values* to future generations
- in providing another *opportunity* for people to give

The UMC mission “. . . is to make disciples of Jesus Christ for the transformation of the world.”

*FUMC Los Alamos* fulfills that mission by:

*Connecting* disciples with Jesus Christ  
*Growing* disciples to maturity in Jesus Christ  
*Caring* for disciples in Christian community  
*Sending* disciples into mission & ministry

For surely  
I KNOW THE  
plans  
I have for  
YOU,  
says the  
Lord...  
TO GIVE YOU A  
future  
WITH  
Hope.  
Jeremiah 29:11, NRSV

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First United  
Methodist Church  
of  
Los Alamos NM

**Endowment  
Fund**

A  
Life  
OF  
Stewardship

# First United Methodist Church Endowment Fund

## What makes this gift different from other forms of church giving?

Our endowment fund is a permanent fund and only its earnings will be spent, in most cases. When funds are available and distributed, they will support projects above and beyond normal budgeted items.

## Are endowment fund gifts tax deductible?

Yes. Your gifts to the First United Methodist Church Endowment Fund are deductible for Federal Income Tax purposes. Bequests, life income gifts and other donations of value are generally exempt from Federal Estate and Gift taxes.

## Who administers the fund?

First United Methodist of Los Alamos Endowment Fund Committee makes recommendations to the church leadership board on how the fund's earnings will be distributed and used. In some cases, special gifts are made and designated for a specific need by the donor, such as capital improvement of the church building or mission outreach. The church will honor these requests to the extent possible.

## What kinds of gifts can be made to our endowment fund?

There are many types of gifts that could benefit our endowment fund. A few of them are:

- *Planned Gifts*
- *Other Bequests*
- *Cash*
- *Stocks & Bonds*
- *Life Insurance*
- *Real Estate*
- *Personal Property*

## Is my gift too small?

Because gifts have a cumulative effect, even the smallest gift is significant. Every gift contributes to the overall growth of the principal amount, which compounds the return on investments.



## What is a planned gift?

A planned gift to the church is a financial gift structured to serve the needs of the church as well as the giver, such as:

- Gifts through *wills*, also known as *bequests*.
- *Charitable gift annuities*, which provide payments for life, tax benefits and ultimately benefit our endowment fund.
- *Charitable remainder* and *charitable lead trusts* to support our endowment fund.

## Can I designate how my gift will be used?

The Endowment Fund could include the following funds such as:

- *Undesignated Fund*
- *Mission/Outreach*
- *Music & Worship*
- *Children & Youth Ministry*
- *Scholarship*
- *Building & Property*

*To find out more details contact  
the FUMC office  
at 505-662-6277*