



Building YOUR Philanthropic Legacy

WITH TEXAS METHODIST FOUNDATION

Philanthropic planning is a wonderful way to share your story. As the story of the people, places, ideas and values that shaped you, philanthropy can be a bridge connecting your past, present and envisioned future.

Over our 80+ year history, TMF has walked along side donors focused on one key question – how can we help you realize your vision of the world that God imagines?

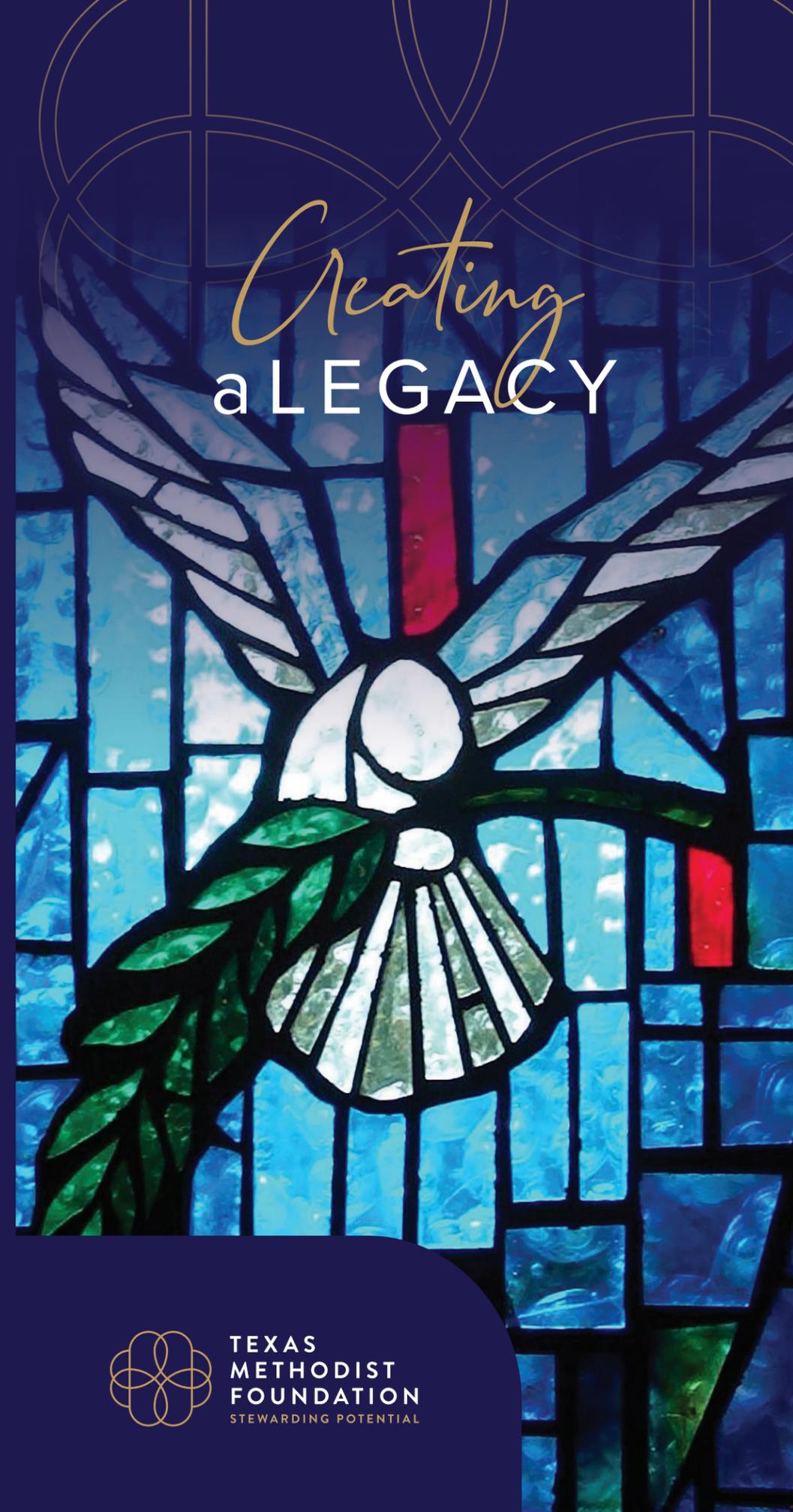
To help you answer this question, TMF’s gift planning team will begin by learning more about your charitable interests, the charities you currently support and how that support can be maximized into the future. Our gift planning team will also share with you our many relationships across Texas and New Mexico of impact ministries and nonprofits that might potentially align with your vision and values.

A donor-advised fund (DAF), described in detail here, is a popular tool for implementing charitable gifts and might provide a tax saving strategy for creating the impact you dream of through charities that most closely embody your story and reflect your values. Your DAF can be invested in the market, grow tax-free and be the philanthropic bridge to share your values with your children and grandchildren.

Please contact TMF to start a conversation and discuss how a DAF can help you accomplish your charitable goals today and extend your legacy for generations to come.



Creating a LEGACY



For more information on gift planning, please contact:


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How Donor-Advised Funds Work

A Tax-Deductible Gift Funds Your Family Philanthropy

A DONOR-ADVISED FUND IS A CHARITABLE GIFT VEHICLE ADMINISTERED BY TMF.

You create a simple fund agreement with TMF and then contribute cash, stock or other assets to your fund for future grant distributions to your favorite nonprofits. You receive an immediate tax deduction when you make contributions to your DAF.

A Simple Agreement Provides Annual Grants

ONCE ESTABLISHED, YOU MAY RECOMMEND GRANTS TO ANY RECOGNIZED 501C3 (BOTH RELIGIOUS AND SECULAR) TO RECEIVE GRANTS FROM YOUR FUND.

Donor-advised funds are often used to make annual gifts to charities and can also be used for more significant gifts to fund campaigns and for capital projects. Grants from your DAF can be made in your name or anonymously and you can also suggest which charities receive the assets remaining in your DAF at your passing.

Growing Your Family Fund

TMF INVESTS AND MANAGES YOUR DAF, BUT YOU MAY RECOMMEND, FROM TMF'S AVAILABLE OFFERINGS, HOW YOUR GIFT IS INVESTED.

TMF offers a menu of competitive investment options that appeal to a growing range of donors seeking to amplify their giving power through a portfolio of investments managed by Wespath Institutional Investments. Depending on your time horizon you may select from one or a combination of the following:

- TMF's Investment Notes
- TMF's Balanced Portfolio
- Wespath U.S. Equity Fund
- Wespath International Equity Fund
- Wespath Fixed Income Fund

We Are Here to Serve You

DONOR-ADVISED FUNDS ARE A VERY POPULAR CHARITABLE GIVING VEHICLE GIVEN THE SIMPLICITY IN ESTABLISHING AND ITS IMMEDIATE TAX ADVANTAGES.

We look forward to working with you and your advisors to ensure that your charitable gift will become an enduring and meaningful legacy for years to come.

If you have questions about donor-advised funds or other ways to leave a lasting legacy, please contact us.

Call us at (800) 933-5502

