

Planned Giving

*Thank you
for considering
a planned gift,*

If you have already made a
planned gift to
First Presbyterian Church,
THANK YOU!
Please let us know so that we
may thank you properly!

If you are interested in learning
more about how to make a
planned gift or to have a
confidential discussion about
opportunities to give to First
Presbyterian,
please contact:

First Presbyterian
Church
1375 E. Bogard Road
Wasilla, AK 99654

You can also visit
www.firstpreswasilla.org
to learn more.

First Presbyterian Church
Wasilla, Alaska

All of us are indebted
to the past, to those
who precede us. We drink
from wells we have not
dug. We enjoy liberties we
have not won. We share
faith whose foundations
we have not laid.

At the same time,
We are seeds of the future,
for those who succeed us.
We dream and envision
and set things in motion.
The fruition of our
decisions will be known
only to others whom we
will not meet. We are
called to partner in faith
with those who have gone
before us and to offer the
best that we have to give
to those who will follow.

*Planting Seeds
for the future*

Endowment Fund

How to make a planned gift

First Presbyterian Church of Wasilla's endowments are one of the resources with which God has provided to be used on God's behalf. Since FPCW's inception in 1947, our endowments have been built up by the gifts and bequests of "faithful stewards," both members and friends, to strengthen the ongoing work of the church. These donors recognized the opportunity to give a gift that keeps on giving, since investment returns magnify the impact of their original gifts. Just as annual stewardship giving is a chance to return to God a portion of our annual income, contributions to the endowment provide a means to share the accumulated gifts which God provides us as a durable support for FPCW's ministry.



Endowment Funds:

For Example, the Gaines and Steele endowment from inception in March 1999 through 2015 has provided over \$300,000 in scholarships.

GIFTS NOW

Appreciated Securities (or other assets): The gift of appreciated securities is most often in the form of common stock or mutual funds. Such a gift is a valuable way to benefit First Presbyterian Church and for you to receive tax benefits based on the fair market value of the assets. Other appreciated assets, like real estate, may be gifted, but it is important to discuss these in advance with First Presbyterian Church.

Real Estate: Real estate may be deeded outright to First Presbyterian Church or left by bequest. The irrevocable gift of property may provide an immediate tax deduction and avoid capital gains. Due to complexities, be prepared to work with First Presbyterian Church and qualified advisors to ensure that this is a suitable gift for both you and for First Presbyterian Church.

Life Insurance: Make a gift of a policy or buy a policy making First Presbyterian Church the owner and beneficiary.

GIFTS THAT PAY INCOME

Pooled Income Fund: A pooled income fund is a charitable trust that pools the gifts of donors for investment. Donors, or persons named by donors, receive a proportional share of the trust's income. After the lifetime of the income recipient, a residual gift amount is withdrawn and contributed to the church.

Charitable Remainder Trust: The remainder trust is an irrevocable gift of assets into a charitable trust that provides you a fixed (Annuity Trust) or variable (Unitrust) income for life or for a set term. At the trust's termination, the trust assets become a generous gift to First Presbyterian Church. There are also potential tax benefits dependent upon your situation.

Charitable Lead Trust: The lead trust's income payments are distributed to First Presbyterian Church for a set period of years, after which the assets are transferred back to the grantor or whomever the grantor has named the beneficiary. This provides generous annual support for First Presbyterian Church now, removes the asset from the estate and passes an asset to heirs with little or no tax. There is no immediate deduction for the lead trust.

GIFTS LATER

Bequest: The bequest is a gift through your will or revocable trust that enables you to retain the asset during your life and provide significant support when you no longer require the asset. You may choose a specific item, a percentage, or a residual bequest. You may also choose to make First Presbyterian Church a contingent beneficiary in case the heirs are unable to receive the estate.

Retirement Plan Assets: In some cases, retirement assets can be the heaviest taxed assets in an estate. Naming First Presbyterian Church as beneficiary can avoid that taxation, enabling the asset to pass tax free to First Presbyterian Church. You may also make First Presbyterian Church a percentage beneficiary or a contingent beneficiary of a retirement plan.

Bank or Investment Account: Financial accounts can be a simple and inexpensive way to leave a legacy gift for First Presbyterian Church. Contact your financial advisor to see how easy the process is to make First Presbyterian Church the beneficiary of a particular investment or bank account.

We encourage you to consult with your professional advisors to ensure this is the right gift for your situation.