

## Ways to Give



**Bequest** - By including First Church as a beneficiary in your will you make a statement about what is important to you and your family, and you ensure the future of the historic meeting house and its vibrant congregation. A single sentence in your will is all it takes: "I bequeath to the First Church in Oberlin, Ohio, (insert percentage of estate or dollar amount or description of property) to be used for the area of greatest need, for a specified program, or to establish an endowment."

**Charitable Gift Annuity** - When you create a charitable gift annuity you give First Church an amount that pays you an annuity for your life. The percent return depends on your age when you begin to take annuity payments. As the remainder of your initial investment will go to the Church as a gift when you no longer need the payments, this option provides tax advantages and is useful for anyone who wants to make a gift but needs the income for life. These annuities are managed by the UCC National Office.

**Retirement Assets** - If you name First Church as the recipient of all or part of your retirement assets, your heirs will avoid the income tax due when such assets are inherited.

## Your Gifts Impact First Church

Bequests, charitable gift annuities, and all gifts First Church receives that are added to its endowed funds have an impact for generations to come. In 1976, John Lord Davis made a gift of \$50,000 in memory of his brother, William Potter Davis. Each year this gift provides thousands of dollars to support operating funds for programs, benevolence, personnel, and maintenance. Furthermore, by returning a small portion of that fund's growth to the endowment every year, the value of that fund is now in excess of \$110,000.

In 2017, First Church received notice of three bequests and estate settlements. Together, these gifts exceed \$450,000. While these funds will benefit the Church immediately by providing \$18,000 toward its annual budget, they will continue to support its work and ministry well into the future.

**When you include First Church in your estate plans, you guarantee that your annual gifts will continue in perpetuity.**



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## First Church in Oberlin United Church of Christ

### The Importance of Planned Giving

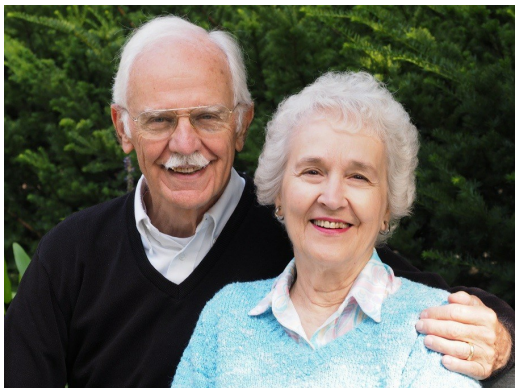


**Gift planning takes many forms and can allow you to provide support for First Church for many years to come.**

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“We decided to include First Church in our gift planning because it has been — it is — a central part of our lives. We discussed it with our children and they agreed that it is important for us to support the church in our final wishes. It gives us great satisfaction to know that we will have a meaningful impact long into the future.”

—Carol and Bob Longsworth



## Join the Finney Tent Society

### **A Gift of Cash**

This is the most direct way to support First Church. In your estate plans you can specify the amount First Church will receive after all assets are liquidated.

### **A Gift of Securities and Real Estate**

Appreciated property can provide greater tax benefit than an equivalent cash gift.

### **A Gift of Retirement Assets**

Qualified retirement plans are created with contributions pre-tax. As a result, if they remain in your estate, they will be taxable when received by your heirs as income. This could greatly reduce their value. You can protect your estate by giving some of these assets during your life or by specifying them in your will.

**Gift planning benefits you,  
your family, and First Church**



“Our parents encouraged us to save for retirement. But only as we’ve gotten older have we come to appreciate the value of those savings. Not only will they serve to leverage our retirement, but they will also go to support those closest to our hearts should something happen to us. First Church is definitely among those closest to our hearts.”

—Anne and JJ Schaum

Planning a gift to First Church enables you to support its mission and to affirm its critical role in the history of Oberlin. By considering your assets and your estate you can find ways to benefit your heirs and First Church while minimizing tax consequences.