



Legacy Giving

Lanier United Methodist Church

Giving methods — summary and forms

Legacy giving helps provide our church sustainability in fundraising for the support of continuing missions and community outreach. Legacy gifts provide givers an opportunity to support our church beyond their own lifetime — investing in our future and continuing the work they cared about throughout their life.

A legacy gift is a committed gift a giver plans to leave to our church as part of their estate after they have passed. Any giver can make a legacy gift to ensure a cause they care about is supported after they are gone. Legacy gifts can be anything: stocks, money, vehicles, real estate, and more.

Benefits to the Church

- Stable, long-term source of revenue
- Sustains programs and projects for the future
- Provides flexible giving options
- Increases giver loyalty and strengthens community ties

Benefits to the Giver

- Creates a lasting legacy — ensuring a mission they care about continues after they have passed
- Potential tax benefits in some situations
- Allows a giver to contribute more than they could during their lifetime

Legacy Giving Methods

The following giving methods are accepted by Lanier UMC. Each has its own form on the pages that follow.

Giving Method	Brief Description
Bequest (Will or Trust)	A designated sum, percentage, or residue of an estate left to the church through a will or revocable trust. Can be general or restricted to a specific purpose.
Charitable Remainder Trust	A giver donates assets to a trust that provides income to named beneficiaries; at the trust's end the remaining assets pass to the church.

Life Insurance Gift	The church is named as a beneficiary of a life insurance policy.
Endowment / Term Endowment	Funds invested so the church may use the interest while preserving the principal; term endowments release funds at a specified date or event.
Retirement / Financial Account Beneficiary	The church is named as a beneficiary on a retirement account (IRA, 401k) or other financial account.

Next Steps for Givers

- Review the giving methods below and select what fits your situation.
- Consult your attorney, financial planner, or tax advisor for personal guidance.
- Complete the interest or intent form for your chosen method and return it to the church office.
- Contact the church office or pastor with any questions.

Church Contact & Tax ID Information

Legal name: Lanier United Methodist Church

Federal EIN: 58-2402769

Mailing address: 1979 Buford Highway, Cumming, Georgia 30041

Church office phone: 770-887-0615

Disclaimer: This church does not provide tax, legal, or investment advice. Consult your tax advisor, financial planner, or attorney. Rules change; verify current IRS and state law.



Bequest (Will or Trust)

Lanier United Methodist Church

Legacy Giving — Giving Method Form 1 of 5

Disclaimer: This church does not provide tax, legal, or investment advice. Consult your tax advisor, financial planner, or attorney. Rules change; verify current IRS and state law.

About This Giving Method

A bequest is the most common form of legacy giving. The giver designates a specific sum of money, a percentage, or the residue of their estate to be left to the church through their will or revocable living trust. Bequests may be unrestricted (for general church purposes) or restricted to fund a specific ministry or project.

What the Giver Needs to Do

- Consult your attorney to add or update a bequest provision in your will or trust.
- Use the church's full legal name and EIN in the bequest language (see sample below).
- Notify the church of your intentions (optional but appreciated).
- Indicate whether the gift is unrestricted or restricted to a specific purpose.

What the Church Needs to Do

- Provide the giver with the church's full legal name, address, and EIN (58-2402769).
- Offer sample bequest language for the giver's attorney to review.
- Maintain a confidential record of stated intentions.
- Thank and steward the giver without providing legal or tax advice.

Legacy Giving Form 1-A — Bequest Interest Card (Giver Completes)

Giver Information	
Full Name _____	Phone _____
Email Address _____	Preferred Contact Method _____
Mailing Address _____	

My Interest / Request
☐ Please send me general information about legacy giving at Lanier UMC. ☐ Please send me sample bequest language for my attorney to review. ☐ I would like a conversation with a church representative about legacy giving. ☐ I have already included Lanier UMC in my will or trust.

Bequest Details (if known — optional)		
<table border="1"> <tr> <td>Approximate Gift Amount or Percentage _____</td> <td>Intended Purpose _____</td> </tr> </table>	Approximate Gift Amount or Percentage _____	Intended Purpose _____
Approximate Gift Amount or Percentage _____	Intended Purpose _____	
Any restrictions or special instructions _____ _____ _____		

Legacy Giving Form 1-B — Sample Bequest Language (Church Provides; Attorney Must Review)

Unrestricted bequest:

I give, devise, and bequeath [percentage / residue / \$_____] to Lanier United Methodist Church, Cumming, GA, a Georgia nonprofit corporation, federal tax identification number 58-2402769, for its general purposes.

Restricted bequest (add to the above):

...restricted to [specific ministry / program / fund]: _____.

Church Office Use Only

Date Received	Assigned To	Notes



Charitable Remainder Trust (CRT)

Lanier United Methodist Church

Legacy Giving — Giving Method Form 2 of 5

Disclaimer: This church does not provide tax, legal, or investment advice. Consult your tax advisor, financial planner, or attorney. Rules change; verify current IRS and state law.

About This Giving Method

A Charitable Remainder Trust (CRT) allows a giver to donate assets to a trust. The trust then pays income to the giver (or other named beneficiaries) for a specified term or for life. At the end of the trust's term, the remaining assets pass to the church if named as the charitable remainder beneficiary.

What the Giver Needs to Do

- Work with an attorney and financial advisor to establish the CRT.
- Name Lanier UMC as the charitable remainder beneficiary.
- Transfer assets (cash, securities, real estate, etc.) into the trust.
- Notify the church of your intentions so the church may plan accordingly.

What the Church Needs to Do

- Provide the church's full legal name and EIN (58-2402769) for trust documents.
- Maintain a confidential record of the stated intention.
- Steward the relationship with the giver over the life of the trust.

Legacy Giving Form 2 — CRT Interest Card (Giver Completes)

Giver Information	
Full Name _____	Phone _____
Email Address _____	Preferred Contact Method _____
Mailing Address _____	

My Interest / Request
☐ I am exploring a Charitable Remainder Trust and would like more information.
☐ I have already established a CRT naming Lanier UMC as the remainder beneficiary.
☐ I would like to speak with the pastor or stewardship team.

Trust Details (if known — optional)	
Estimated Asset Value _____	Type of Assets _____
Trust Term (years or lifetime) _____	Intended Purpose of Remainder Gift _____
Any additional instructions or notes _____ _____	

Church Office Use Only

Date Received	Assigned To	Notes



Life Insurance Gift

Lanier United Methodist Church

Legacy Giving — Giving Method Form 3 of 5

Disclaimer: This church does not provide tax, legal, or investment advice. Consult your tax advisor, financial planner, or attorney. Rules change; verify current IRS and state law.

About This Giving Method

A giver can make a gift of life insurance by naming the church as a beneficiary of a policy. Upon the giver's passing, the insurance proceeds are paid directly to the church outside of the probate process.

(Note: The church is not permitted to accept ownership transfer of an existing policy.)

What the Giver Needs to Do

- Contact your insurance company or agent to request a change-of-beneficiary form.
- Name Lanier United Methodist Church as a primary or contingent beneficiary.
- Notify the church of your intentions.

What the Church Needs to Do

- Provide the church's full legal name and EIN (58-2402769) for beneficiary designation forms.
- Maintain a confidential record of stated intentions.
- Steward the relationship and thank the giver per policy.

Legacy Giving Form 3 — Life Insurance Gift Interest Card (Giver Completes)

Giver Information	
Full Name _____	Phone _____
Email Address _____	Preferred Contact Method _____
Mailing Address _____	

My Interest / Request
☐ I am interested in naming Lanier UMC as a beneficiary on my life insurance policy. ☐ I have already named Lanier UMC as a beneficiary on my policy. ☐ I would like to speak with the pastor or stewardship team. ☐ Please send me general information about this giving method.

Policy Details (if known — optional, kept confidential)	
Insurance Company _____	Policy Number (optional) _____
Approximate Face Value _____	Beneficiary Percentage for Church _____
Primary or Contingent Beneficiary? _____	Intended Purpose of Gift _____

Church Office Use Only

Date Received	Assigned To	Notes



Endowment / Term Endowment

Lanier United Methodist Church

Legacy Giving — Giving Method Form 4 of 5

Disclaimer: This church does not provide tax, legal, or investment advice. Consult your tax advisor, financial planner, or attorney. Rules change; verify current IRS and state law.

About This Giving Method

Endowments are funds invested so that the church may use the interest earned while preserving the principal. A term endowment is invested until a specified date or triggering event (such as the giver's passing), after which it may be used to fund specific programs or provide ongoing support. Givers can specify the purpose of the endowment and any conditions.

What the Giver Needs to Do

- Discuss endowment options with the church office or stewardship team.
- Work with your attorney and financial advisor to structure the gift.
- Specify the purpose, any restrictions, and the term or conditions of the endowment.
- Notify the church of your intentions so the church may plan accordingly.

What the Church Needs to Do

- Provide information on the church's endowment policies and acceptable uses of funds.
- Work with the giver's advisors to document the endowment agreement.
- Maintain proper records and investment stewardship of endowed funds.
- Report annually to the church on endowment performance and distributions.

Legacy Giving Form 4 — Endowment Interest Card (Giver Completes)

Giver Information	
Full Name _____	Phone _____
Email Address _____	Preferred Contact Method _____
Mailing Address _____ _____	

My Interest / Request
☐ I am interested in establishing an endowment for Lanier UMC. ☐ I am interested in a term endowment (funds released at a specified date or event). ☐ I have already established an endowment or plan to include one in my estate. ☐ I would like to speak with the pastor or stewardship team. ☐ Please send me general information about endowments.

Endowment Details (if known — optional)	
Estimated Gift Amount _____	Type: Permanent Endowment / Term Endowment _____
Intended Purpose / Funded Program _____	Term or Triggering Condition _____
Any restrictions or special instructions _____ _____ _____	

Church Office Use Only

Date Received	Assigned To	Notes



Retirement / Financial Account Beneficiary

Lanier United Methodist Church

Legacy Giving — Giving Method Form 5 of 5

Disclaimer: This church does not provide tax, legal, or investment advice. Consult your tax advisor, financial planner, or attorney. Rules change; verify current IRS and state law.

About This Giving Method

Like a life insurance gift, a giver can name the church as a beneficiary on a retirement account (IRA, 401(k), 403(b), etc.) or other financial account. Naming a charity as beneficiary of a retirement account can be especially tax-efficient, since charities do not pay income tax on inherited retirement funds the way individual heirs do.

What the Giver Needs to Do

- Contact your retirement plan administrator or financial institution to request a beneficiary designation form.
- Name Lanier United Methodist Church as a primary or contingent beneficiary.
- Specify the percentage of the account to be left to the church.
- Notify the church of your intentions.

What the Church Needs to Do

- Provide the church's full legal name and EIN (58-2402769) for beneficiary designation forms.
- Maintain a confidential record of stated intentions.
- Steward the relationship and thank the giver per policy.

Legacy Giving Form 5 — Retirement / Financial Account Beneficiary Interest Card (Giver Completes)

Giver Information	
Full Name _____	Phone _____
Email Address _____	Preferred Contact Method _____
Mailing Address _____ _____	

My Interest / Request
☐ I am interested in naming Lanier UMC as a beneficiary on a retirement or financial account. ☐ I have already named Lanier UMC as a beneficiary on one of my accounts. ☐ I would like to speak with the pastor or stewardship team. ☐ Please send me general information about this giving method.

Account Details (if known — optional, kept confidential)	
Type of Account (IRA, 401k, etc.) _____	Financial Institution _____
Approximate Account Value _____	Beneficiary Percentage for Church _____
Primary or Contingent Beneficiary? _____	Intended Purpose of Gift _____

Church Office Use Only

Date Received	Assigned To	Notes