

First Congregational United Church of Christ, Albuquerque, New Mexico

How to Establish a Planned Gift

“When we cast our bread upon the waters, we can presume that someone downstream whose face we will never know will benefit from our action, as we who are downstream from another will profit from the grantor’s gift.”

Maya Angelou

Thank you for your interest in establishing a planned giving gift to First Congregational United Church of Christ. Planned giving provides an opportunity to leave a meaningful legacy, maximize your philanthropic objectives and receive important tax benefits. Your interest is an expression of your values and commitment to good stewardship. It is also an expression of your commitment to the church family that we all love and support joyfully.

There are five principal types of giving in the church’s life. They consist of annual giving, capital gifts, special offerings, memorial offerings, and planned giving. The most significant difference between “planned” and other types of gifts is that a planned gift will provide a future value to our church rather than an immediate value. Options include unrestricted gifts, bequests to the church’s endowment funds or gifts for a special purpose or use.

Here are the basic steps for establishing a planned gift for First Congregational United Church of Christ, Albuquerque, New Mexico:

1. Review the Planned Giving brochure from the United Church Funds available on this web site (http://firstuccabq.org/s/planned_giving.pdf). This brochure provides a general overview of planned giving within the United Church of Christ and its local churches.
2. Review “A Summary of Ways of Giving” available on this web site (http://firstuccabq.org/s/giving_summary.pdf). This document will help you identify tangible ways of gifting our church through planned giving.
3. If you have no will or estate plan, we strongly recommend that you complete the Estate Planning Guide, developed by the United Church Funds. It is available from our church web site at (http://firstuccabq.org/s/estate_planning.pdf) or in hard copy from the church office. Once completed, contact your attorney or an attorney specializing in wills who can help you prepare a formal will using the information available in the Estate Planning Guide.
4. If you already have a will and your planned gift is a simple bequest, we recommend contacting your financial and legal advisors to ensure tax and philanthropic objectives are met.

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5. If you already have a will and your proposed planned gift is in the form of a Charitable Gift Annuity, Charitable Remainder Trust, or Individual Retirement Account, we recommend contacting the United Church Funds to obtain free annuity illustrations and other information on your planned gift. Your financial and legal advisors should then be contacted to ensure income, tax and philanthropic objectives are met.
6. Contact the church office (phone: 505.265.5749) to let them know you are ready to make your planned gift and establish your lasting legacy. Representatives from the Ministry Leadership Team or Finance Committee will be available to discuss our church's greatest needs, priorities, and explain the intended purpose and use of our endowment funds so that your final decision on planned giving can be made with complete confidence.
7. Contact the church office administrator (phone: 505.265.5749) to coordinate transfer of gifted assets to the church. When the transfer is complete, the church administrator will officially record receipt and acceptance of the planned gift.