

Gifts of Retirement Assests

A uniquely effective way to include BMPC in your estate plan is to make a gift of assets held in a qualified retirement plan, such as an IRA, 401(k) or 403(b) account. Since retirement plans are often subject to both income and estate taxes upon the death of the participant (potentially 75% or higher), they present an attractive option for a charitable gift to BMPC which can receive the proceeds completely free of taxes. Alternatively, gifts to BMPC can be made of some or all lifetime distributions from these retirement funds.

To make The BMPC Foundation a beneficiary of a retirement plan, call your financial planner or other advisor to add The Bryn Mawr Presbyterian Church Foundation as a beneficiary.



Gifts of Life Insurance

Many people own life insurance because of its unique ability to satisfy a variety of needs for financial protection. A further way to make a gift to the Church is by naming The BMPC Foundation as the primary beneficiary or secondary beneficiary of an existing or new life insurance policy. You can also gift the policy to the church. There may be some added tax benefits to this option.



Life Income Gifts

There are many ways to support the work of BMPC through gifts that provide you with income during your lifetime, including:

- Charitable gift annuities
- Deferred charitable gift annuities
- Charitable remainder trusts
- Pooled income funds

Such gifts can provide you with both increased current income as well as significant current income tax deductions. They can also reduce estate taxes. By using assets that may produce little or no income today, such gifts can provide additional income for retirement years. Additionally, these gifts can also eliminate capital gains taxes if the gifts are made with appreciated property such as securities or real estate.

For more information about The Bryn Mawr Presbyterian Church Foundation, visit <http://www.bmpc.org> or contact Sarah Miciek, Finance Manager, at SarahMiciek@bmpc.org or 610-525-2821, ext. 8817.



For More Information

If you would like more information about making a gift to The Bryn Mawr Presbyterian Church Foundation, call 610-525-2821, visit the BMPC website at <http://www.bmpc.org>, or fill out the information below and mail it to BMPC at the address listed. All inquiries and gift designations are strictly confidential.

I have included BMPC in my estate plan as a beneficiary of my:

- Will _____
- Trust _____
- Life insurance policy _____
- Retirement plan _____
- Other estate plan: _____

____ Please call me to discuss how to include the Church in my estate plan.

____ Please call me to discuss how I could make a gift that would provide me income during my lifetime.

____ Please call me to discuss how I could make a gift of real estate or life insurance.

Name: _____

Address: _____

City: _____

State: _____ Zip: _____

Phone Number: _____

Best time to call: _____

Email: _____

Please return form to:

The Bryn Mawr Presbyterian Church Foundation
625 Montgomery Avenue
Bryn Mawr, PA 19010

Bequests

The most common estate gift to the Church is a bequest in a will. Bequests allow donors to make gifts that may not have been possible during their lifetimes. They can take several forms:

- **General Bequest:** A gift to BMPC in a stated amount.
- **Specific Bequest:** A gift to BMPC of a specific asset (e.g. stock, artwork, or real estate)
- **Residual Bequest:** A gift to BMPC of all or a percentage of the rest of your estate (the balance remaining after all debts, administrative expenses, taxes, and other bequests have been paid).
- **Contingent Bequest:** A gift to BMPC as an alternate beneficiary. BMPC would only receive this gift if an individual named in the will is not alive or a named organization is no longer in existence.

The following language can be given to your attorney or financial advisor to make an unrestricted bequest to BMPC in your will:

I hereby give, devise and bequeath to The Bryn Mawr Presbyterian Church Foundation, a nonprofit corporation organized and operating under the laws of the Commonwealth of Pennsylvania, the sum of

(or _____ of the rest, residue and remainder of my estate) to be used for its general purposes.



The BMPC Foundation...

- **Encourages** and receives contributions for the endowment of the Bryn Mawr Presbyterian Church
- **Invests** its funds to support the Church's mission and increase the value of the Foundation's assets over time
- **Administers** its funds to accomplish the donors' intentions
- **Seeks** innovative and responsive ways in which its assets may serve the Church, the community, and the wider world



Through these gifts, however great or small, we can leave a rich and timeless legacy that will strengthen this congregation and the Christian community beyond our walls for years to come. At the end of our journey in this world, we can share the joy of our faith with those whose journey here has not yet begun.

Estate gifts create your legacy to The Bryn Mawr Presbyterian Church Foundation. Lifetime charitable gifts may provide you with tax benefits. Similarly, gifts through your will or estate plan may provide tax benefits to your estate and heirs.

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The Bryn Mawr
Presbyterian Church
Foundation

...a ministry
worth
preserving

