

# 1 LEARN

*What planned giving really is:*

As you plan your gift, please know that planned giving is far more than a transaction, it is...

## OPPORTUNITY...

for you who care so deeply for this church and want to continue energizing this mission and its ministries, even after your lifetime.

## THE GIFT OF OUR LIFETIME...

for you who are using your assets fully today – like your financial, personal and real assets. After our lifetime, when we pass along those assets remaining, most of us have the opportunity to make the largest and therefore the most impactful gift of our lives.

## LEADERSHIP...

for you whose generous decisions and actions have been witnessed by others. Your planned gift teaches others to re-deploy the resources they have to lift up others - during their lifetimes and after.



If you would like to learn more about planned giving, please contact us to learn more.



## CONTACT

### Planned Giving Committee

...to learn more about the endowment and your impact.

Tel: 505-982-8544  
E-mail: [Office@fpcsantafe.org](mailto:Office@fpcsantafe.org)

### Presbyterian Foundation

...to learn more about details of a planned gift.

Tel: 510-688-8595  
E-mail: [Maggie-harmon@PresbyterianFoundation.org](mailto:Maggie-harmon@PresbyterianFoundation.org)

First Presbyterian Church *of* Santa Fe

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## Bringing Ministry to Future Generations



## Steps to a Planned Gift

## 2 DESIGN

*Your Gift*

Planning your gift may enable you to send more to ministry or to protect more future value for you and your family. Here are some of the more common gifts that you might consider:

**Bequest:** Make a gift after your lifetime through your will or trust. This can be a fixed dollar amount, a specific asset, or a percentage of your estate.

**Retirement Account:** This can be the most heavily taxed asset in many estates. Choosing this as your gift might leave your less tax-burdened assets to your loved ones.

**Charitable Trust:** Trusts can combine flexible benefits including a generous income, tax benefits and a powerful gift to the church.

**Other:** Many other giving opportunities might prove ideal for your situation.

### Caring for estates, assets and gifts often requires help.

Please consider our representative at the Presbyterian Foundation noted on the back of this pamphlet as your resource for exploring planned gifts and their respective benefits. In order to make sure a particular planned gift fits your situation; we suggest that you **consult with your professional advisor** on how this gift would fit into your plans.

## 3 IMPACT

*The Future*

**The Heritage Circle Funds** are established to ensure that your gift provides extraordinary service through ministry now and for those who follow us.

### Heritage Circle Vision Statement

As the oldest Presbyterian Church in New Mexico, First Presbyterian Church has a long and distinguished history. What we enjoy now and cherish – our witness in the community, mission to others and programs of worship, education and service – were in large part created by those who came before us.

Membership in the Heritage Circle provides an opportunity to extend your financial support beyond your lifetime.



## 4 TEACH

*Generosity*

We teach by demonstrating our values through our words and actions. Now that you have made a gift, you may expand your impact by sharing with loved ones the *why* of your gift.

**Share the news of your gift** so that others can witness your commitment beyond your lifetime — and follow your example to plan their own legacy for the future.

**Please consider sharing news of your gift with the church** so that others may witness your joy and explore their own pathway to such a gift.

### Action

JOIN the  
HERITAGE  
CIRCLE.



The Heritage Circle was established as a way for us to thank those who make a planned gift for the ministry that they will make possible for future generations.

Please consider joining so that we may express our heartfelt gratitude for your thoughtfulness and generosity.