

WILLS, TRUSTS, & LEGACY GIVING – Agenda

- ❑ Introductions
- ❑ What Is Planned Giving? Why Consider a Planned Gift?
- ❑ Primary Planned Giving Vehicles
- ❑ Benefits to You, Your Loved Ones, Your Church
- ❑ Top 10 Reasons to Tell the Church It Is In Your Will
- ❑ The UCC & United Church Funds
- ❑ Where Does the Money Go at First Church Berkeley?
- ❑ The First Church Berkeley Legacy Circle & Website Page
on Giving
- ❑ Q&A Time

MEDIAN NET WORTH

- Age 35 or younger: **\$11,100**
- Age 35-44: **\$59,800**
- Age 45-54: **\$124,200**
- Age 55-64: **\$187,300**
- Age 65-74: **\$224,100**
- Age 75 or older: **\$264,800**

**DO I HAVE
ANYTHING
TO GIVE?**

AVERAGE (MEAN) NET WORTH

- Age 35 or younger: **\$76,200**
- Age 35-44: **\$288,700**
- Age 45-54: **\$727,500**
- Age 55-64: **\$1.17 million**
- Age 65-74: **\$1.07 million**
- Age 75 or older: **\$1.07 million**

WHAT'S MOST IMPORTANT TO YOU?

WHAT DO YOU WANT TO SEE IN THE WORLD?




PRIMARY PLANNED GIVING VEHICLES

- ☐ Wills/Bequests
- ☐ Individual Retirement Accounts (IRAs)
- ☐ Life Insurance
- ☐ Life Income Gifts



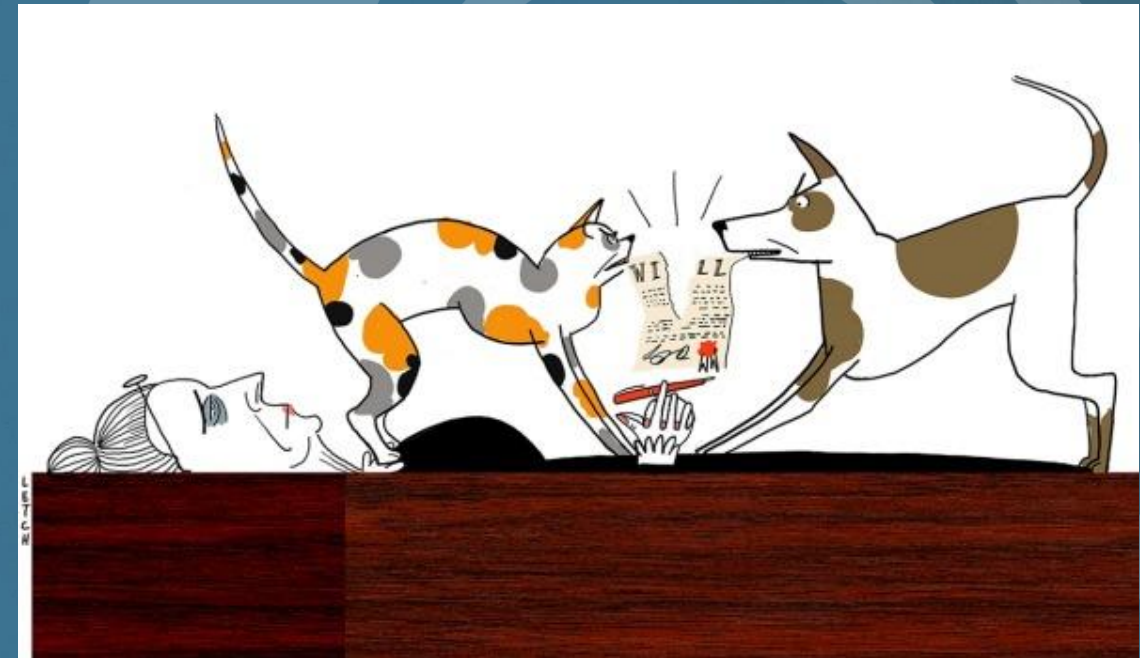
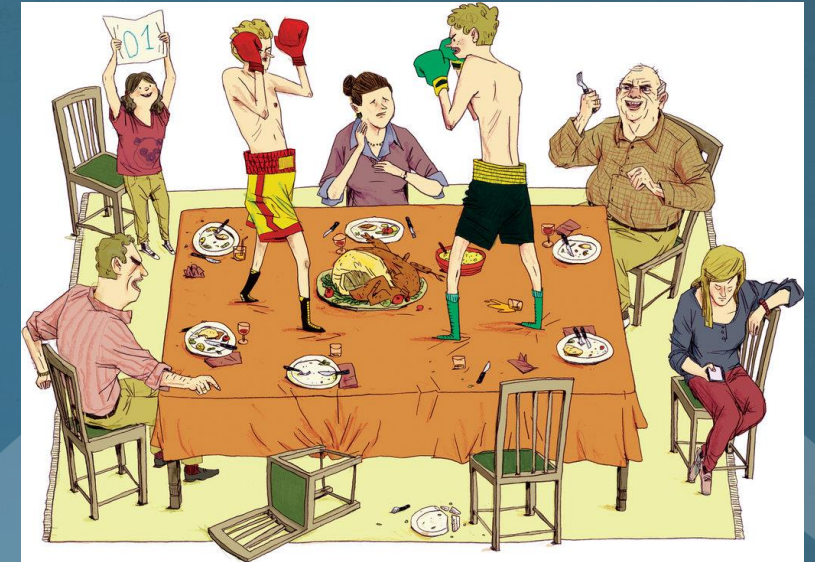
BENEFITS OF PLANNED GIVING

TO YOU

- ☐ Clarity & Peace of Mind
 - ☐ Expression of Values & Mission
 - ☐ Joy of Giving While Alive
 - ☐ Provide for Partner or Others
 - ☐ Reduce Tax Consequences/Avoid Probate Court
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BENEFITS OF PLANNED GIVING

TO YOUR LOVED ONES
(in addition to previous list)



BENEFITS OF PLANNED GIVING


TO YOUR CHURCH

- ☐ Make Your Current Annual Giving Perpetual
- ☐ Enable Greater Mission Impact
- ☐ Provide & Plan for the Future
- ☐ Meet Immediate Needs If So Designated



BENEFITS OF PLANNED GIVING

TO CHARITIES OF CHOICE

- ☐ Organizations/nonprofits you give to now
 - ☐ Consider Northern California Nevada Conference
 - ☐ Consider the UCC National Setting
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TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL

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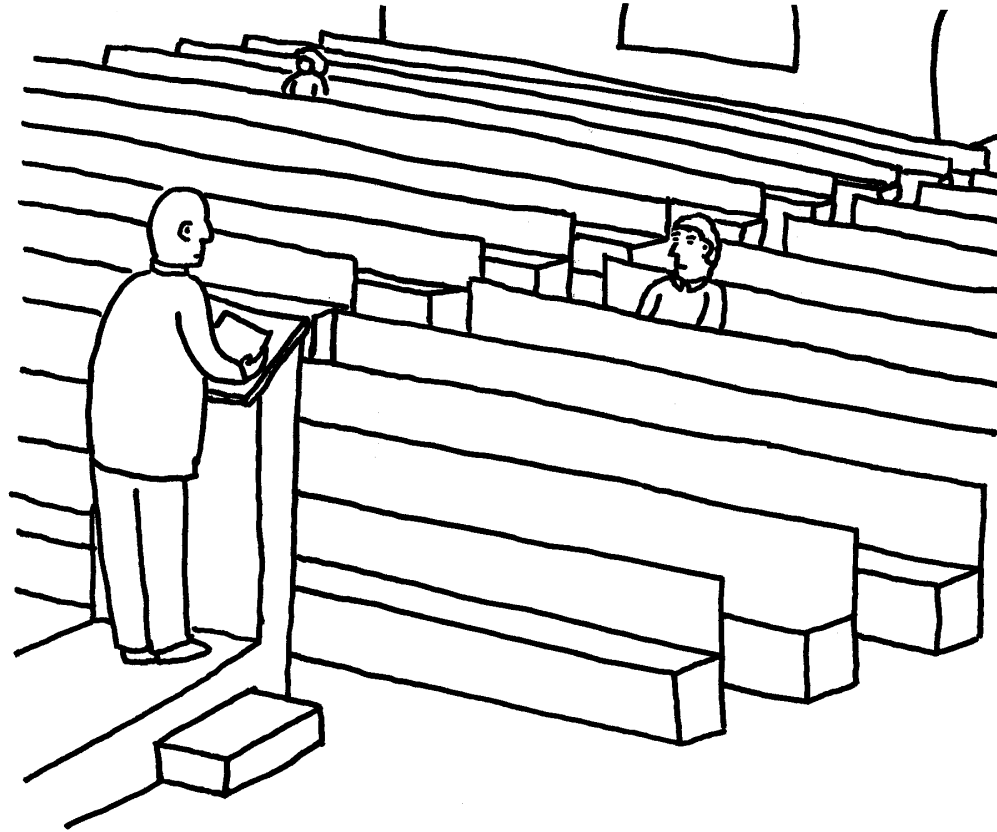
TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL



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TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL

CartoonChurch.com



IT IS NOT ABOUT THE NUMBERS

TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL

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TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL



TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL

5



Planning our Budget

4

TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL



3

TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL



2

TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL



TOP 10 REASONS TO TELL THE CHURCH IT'S IN YOUR WILL

TURN FIRST CHURCH BERKELEY'S VISION INTO REALITY!



We are a community that values radical inclusion
and artful worship,
where belonging is more important than belief,
and joy is a guiding principle.

We are a restorative sanctuary for the suffering and weary,
a space for creative and contemplative ritual,
and a hub for transformative
moral action on the justice issues of our day.

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UCC & UNITED CHURCH FUNDS PARTNERSHIP

- ❑ Charitable Gift Annuities
- ❑ Charitable Remainder Trusts
- ❑ Church Investments



FIRST CHURCH BERKELEY LEGACY CIRCLE & WEBSITE TOUR

- ❑ Updated information and resources at church's website:
- ❑ www.firstchurchberkeley.org/give
- ❑ Anyone who establishes a legacy gift to First Church Berkeley and has completed the "Legacy Circle Form" is automatically made a member of the **First Church Berkeley Legacy Circle** as our means of recognizing your lasting commitment to our church.
- ❑ Let's take a tour!



QUESTIONS



OPTIC –

Office of Philanthropy,
Technology, Identity, &
Communications

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