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**

### 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**

Source: Federal Reserve Survey of Consumer Finances, [www.cnbc.com](http://www.cnbc.com), May 15, 2019
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
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
TOP 10 REASONS TO TELL THE CHURCH IT’S IN YOUR WILL
TOP 10 REASONS TO TELL THE CHURCH IT’S IN YOUR WILL
TOP 10 REASONS TO TELL THE CHURCH IT’S IN YOUR WILL

IT IS NOT ABOUT THE NUMBERS
TOP 10 REASONS TO TELL THE CHURCH IT’S IN YOUR WILL
TOP 10 REASONS TO TELL THE CHURCH IT’S IN YOUR WILL
TOP 10 REASONS TO TELL THE CHURCH IT’S IN YOUR WILL

Planning our Budget

UNITED CHURCH OF CHRIST
TOP 10 REASONS TO TELL THE CHURCH IT’S IN YOUR WILL
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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.
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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