

I have reviewed your brochure and:

- I would like to speak with someone who can provide additional information.
- I would like to receive information on other charitable gift planning options.
- I have named the EFCA or my local church within my will, trust or via beneficiary designation.

Name _____ DOB ____/____/____

Name _____ DOB ____/____/____

Street _____

City _____

State/Zip _____

Home Phone _____

Cell Phone _____

Email _____

Home Church _____

The best way to contact me is by:

- Email
- Mail
- Phone

Please complete and return. All inquiries are treated with complete confidentiality. You are under no obligation.

Possible Beneficiary Designation Accounts

Individual Retirement Accounts (IRAs)

Retirement Plans

- 401(k), 403(b), 457 plans
- SEP and SIMPLE IRAs
- Pension Plans
- Employee stock ownership plans

Life Insurance

Annuities

Employee Benefit Plans

- Group Term Life policy
- Stock options
- Restricted stock
- Employee stock purchase plans
- Nonqualified deferred compensation plans

Transfer-on-death accounts (at banks or with brokerage houses)

Transfer-On-Death Deeds (available for real estate in some states)

BENEFICIARY DESIGNATIONS



Leave A Legacy and Avoid Probate.



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BD2018

Godly Living. Joyful Giving.



Support Your Heirs and His Causes

Bob and Joan Johnson serve their local church in many ways. They love Christ and strive to share Christ's love with others. The Johnsons have decided to financially support both their family and the Lord's work within their estate plans. They view this as good stewardship.

Working with their attorney, they updated their wills to provide for their children. They also reviewed and updated their beneficiary designations.

They plan to use these funds to support their lifetime income needs. Ministry will get what might be still left over.

UNDERSTANDING BENEFICIARY DESIGNATIONS

Most of us think estate planning only involves wills and trusts. However, in many cases, those legal documents have absolutely no effect on some of your most important assets. Certain assets will be transferred to the individuals or ministries as named on the beneficiary forms. Simply put, their wills will not control the distribution for these beneficiary designation accounts.



Did you know? Retirement assets, like IRAs, make an excellent gift to ministry. If the IRA were given to your family, much of the value would be depleted through estate and income taxes. By designating ministry as the beneficiary, the full value of the gift is transferred tax free at your death, and your estate receives a charitable deduction. Consider gifting IRAs to the EFCA and gifting other assets to your loved ones. It is a tax-wise method to benefit your family and ministry.

THINGS TO CONSIDER

- Don't forget to name beneficiaries.
- Name both primary and contingent beneficiaries.
- Your family, your friends, and your favorite charities/ministries can be named in full or in part.
- Remember to update beneficiaries as your needs and goals change.
- Coordinate your beneficiary designations with your will and trust so your plan works as intended.
- Review your total estate plan regularly with your attorney and financial advisors.
- Support our mission by naming The Evangelical Free Church of America through a bequest or beneficiary designation.
- EFCA tax identification number: 41-0721672

Here's How They Did It:

- 1
- 2
- 3

They contacted their life insurance agent for a Change of Beneficiary Form.

Bob listed Joan as primary beneficiary on his policies. Likewise, Joan listed Bob as her primary beneficiary on her policies.

Both of them listed the Evangelical Free Church of America as the contingent beneficiary on these policies.

