

**Shalimar  
United Methodist  
Church**



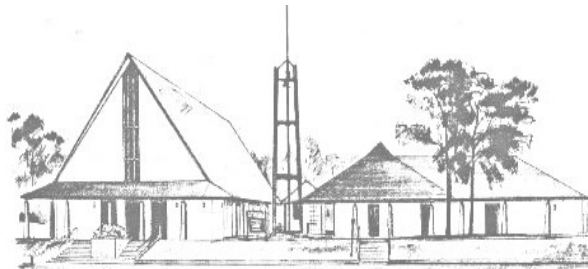
**PERMANENT  
ENDOWMENT  
FUND**

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*Each of you must give as you  
have made up your mind,  
not reluctantly or under  
compulsion, for God loves a  
cheerful giver. And God is  
able to provide you with  
every blessing in abundance,  
so that by always having  
enough of everything, you  
may share abundantly in  
every good work.*

**2 Corinthians 9:7-8**

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I/We would like to speak with someone  
from church about our Shalimar UMC  
Permanent Endowment Fund.

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_

**Please mail to:**

 **Shalimar**  
United Methodist Church  
1 Old Ferry Road / P.O. Box 795  
Shalimar, FL 32579

Email: [office@shalimar-umc.org](mailto:office@shalimar-umc.org)  
Website: [www.shalimar-umc.org](http://www.shalimar-umc.org)  
Phone: 850-651-0721

## How Your Gift Helps

The SUMC Permanent Endowment Fund was established in 2002 to permit members and others to make lasting gifts to the church and its ministries. These gifts can continue to give for extended periods of time, even beyond the donor's lifetime.

### How It Works

Your charitable, tax deductible gift will be pooled with other gifts into the fund. The principal will not be spent, but will continue to grow through donations such as yours, while the interest earned by the fund will be used to support ministries of the church. Gifts may be as small as \$10 or as large as the donor desires. Gifts of \$10,000 or over may be designated for a specific purpose. Gifts under \$10,000 will go into the general undesignated fund. In any case, the gift will be invested with the Alabama-West Florida United Methodist Foundation for use by SUMC.

The Permanent Endowment Fund is intended for purposes that are not part of the church's established programs (which are funded through the annual operating budget of the church and the regular giving of its members). These include, but are not limited to, special mission projects, special ministry needs, training opportunities, scholarship aid, building improvements and maintenance. Use of all permanent endowment funds is determined by the Endowment Fund Committee and approved by the Church Council.

*Because the principal is never spent, the income from the endowment fund will always be available for special needs of the church not covered by the general operating budget, thus your gift will always continue to bless the church, even beyond your lifetime.*

### Many Ways to Give

*There are many ways for you to give a permanent endowment gift that continues to give. Please consider one of the following:*

#### Cash Contribution

*Donate cash as a gift to the Permanent Endowment Fund*

#### Bequest in Your Will

*Working with your attorney, add the SUMC Permanent Endowment Fund as a beneficiary of your will after other bequests (to children, family members, other charities) have been fulfilled, or as a residual beneficiary in the event others named in the will do not survive you.*

### Stocks, Bonds, or Other Securities

*Make a gift of appreciated stocks held long term, and receive a tax deduction for the "current market value" of the securities; you may also avoid paying some capital gains taxes by gifting appreciated securities, and be able to give more to the church at no cost to yourself.*

#### Life Insurance

*You can make the endowment fund the beneficiary, or residual beneficiary, of your life insurance policy.*

For any of the above, be aware that state or federal law may impose certain restrictions or requirements. Consult your attorney, financial planner, or insurance agent for assistance.

