



THE WESLEYAN CHURCH

*Estate  
Planning  
Data  
Guide*

*determine to  
finish well*



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## *The Voice of Your Legacy*

Based on the numbers, you would have to conclude that the vast majority of Americans are either not aware, or don't care that each of us has the opportunity to articulate our last will and testament.

In fact, while most people may be cognoscente of the reality that life inevitably leaves a mark, there is an amazing tendency to ignore the fact that every single American has the opportunity to ensure that a personal voice echoes within that legacy. This is, after all, the real definition of a Last Will and Testament.

Yet, every year as many as seventy to eighty percent of adult Americans who die, do so without having let their own voice be heard in the form of their personal Will. As a result, the state determines the "voice" of these legacies.

When you consider the fact that the Will is the place where specifics such as custody of minor children, distribution of property, and the permanent manifestation of values can be spelled out, one cannot keep from wondering why so many fail to take advantage of all that a Will makes possible.

### *Too Busy Living To Think About Dying*

This may well be the single biggest reason so many Americans die without having prepared a valid Will. Daily living – from dawn to way past dark – is so demanding that it seems virtually impossible to think about anything even remotely related to death. Add to this the fact that, for most, death isn't the most exciting of topics and you have all the ingredients necessary to make us push the topic of a Will to the "back burner."

The unfortunate truth is that the lives of children, spouses, and loved ones can often be complicated with awkward circumstances because a deceased family member failed to articulate important specifics. Time, emotion, and significant amounts of money are often invested by survivors in order to probate a Will. This doesn't even touch the cost of legal issues concerning property distribution or the custody of minor children.

### *We're Not Dealing With A Mansion, Here!*

Since few of us ever think we may die by the end of the week, creating or updating a Will is something that is easily put off until another day. Couple this with the fact that many people look at a modest home and property – especially in younger adult years – and think their estate too small to warrant the time and expense of a Will. This is often a costly assumption.

Even after only a few short years, the value of a home may have escalated far more than thought. A few of the right stocks -- even shares in a closely held, non-public entity -- can increase enough over time that the tax and distribution implications are significant. The lesson here is that even in cases where an estate is seemingly so small that it hardly

warrants the creation of a Will, values can change quickly as a result of inflationary times. So, even in the case of young couples or estates that are seemingly very modest, a Will that outlines basic parameters can minimize the effect of costs and taxes in the event of an untimely death

### *Preparing A Will Is Too Costly*

While we *do* recommend that you invest in the professional preparation of a Will, the cost need not be overwhelming. Every situation is unique, but the amount you'll invest in articulating your specific wishes (often as little as \$200 - \$600) almost always results in significant savings when compared to tax shrinkage and/or settlement costs at the time of death. And if it were possible to affix a dollar figure to the personal and family issues that often result in the absence of a Will, the cost would seem miniscule, indeed.

### *Whatever The Reason . . .*

The result of death without a Will – dying *intestate* – varies, of course, depending on the specifics of each situation. But regardless of the reason, it can often mean shrinkage due to a larger than necessary estate tax settlement; it can significantly prolong the probate process, and demand much more time and energy on the part of the executor; it can cause strife among family and loved ones, as specific property issues are dealt with; in the case of minor children, it results in a judge determining who will raise your children.

But regardless of the specifics, perhaps the real impact of death without a Will is that it robs a legacy of its rightful voice. For, in the event of an intestate death, the state in which death occurs gives voice to the legacy. This means that the state will make every decision related to the final (and lasting) imprint of a life.

Failure to prepare a Will means that family members do not benefit from the peace that comes from a final “word” from a loved one; it means that charitable efforts deemed important during life do not benefit from the permanent voice that a Will gives to values.

Every single voice will leave a legacy for future generations. The preparation of a Will is your opportunity to ensure that your legacy resounds with your voice and your wishes.

Stewardship Ministries is prepared to assist you with the important task of estate planning. We trust the information that follows will guide you through the process of gathering the information necessary to draft the legal documents that will comprise your personal legacy.

Thank you in advance for the opportunity to assist you.

Wayne Derr, Executive Director  
Stewardship Ministries of The Wesleyan Church

## I. GLOSSARY OF TERMS

<b>ADMINISTRATOR</b>	The person or agency appointed by a court to settle the estate of the person who dies without a WILL (intestate).
<b>BENEFICIARY</b>	The person named in a WILL to receive funds or property from an estate.
<b>BEQUEST</b>	A gift of personal property by WILL.
<b>CODICIL</b>	An addition to or a revision of a WILL, used merely as a supplement. It is often better to rewrite the WILL.
<b>DEVISE</b>	To give real property by WILL. A gift of real property.
<b>ESTATE</b>	Property of an individual, real or personal, in the process of administration.
<b>ESTATE TAX</b>	A federal excise tax upon property, the transfer of which is related to the death of the owner.
<b>GIFT TAX</b>	A federal excise tax assessed on the transfer of property, real or personal, during one's lifetime. The tax is usually paid by donor.
<b>GUARDIAN</b>	One who manages the property of a minor, and/or is appointed to have custody of them.
<b>HEIRS</b>	A class of relatives entitled to receive property by the person who dies intestate (without a WILL).
<b>INHERITANCE TAX</b>	A tax levied by a state upon distributed shares of a deceased person, based on the privilege of receiving property.
<b>JOINT TENANCY</b>	Where two or more persons own property, real or personal, whereby property does not pass to heirs and cannot be disposed by WILL.
<b>MARITAL DEDUCTION</b>	An arrangement whereby 100% of an estate can be passed to a spouse, thus exempting it from the Federal Estate Tax (FET).
<b>PERSONAL PROPERTY</b>	All moveable possessions not fixed to land.
<b>PERSONAL REPRESENTATIVE</b>	The person or agency named in a WILL to administer the estate of a deceased person (may also be called “executor” or “executrix”).

<b>PROBATE</b>	The process of legally and formally proving a WILL.
<b>REAL PROPERTY</b>	Land and buildings permanently fixed to land.
<b>TENANCY IN COMMON</b>	Where two or more persons own property, real or personal, and undivided ownership passes to the estate of a deceased 'tenant.'
<b>TESTAMENTARY</b>	Created or ordered by a decedent's WILL.
<b>TRUST</b>	An arrangement between two parties whereby one of them (trustee) holds and manages property for the benefit of another (beneficiary).
<b>WILL</b>	A legal declaration which makes provisions for the distribution of property at death.

## **II. PREPARING FOR YOUR COUNSELING SESSION GATHERING THE INFORMATION**

As you sit down to work with our representative in developing an estate plan which will fulfill your desires, you will need to know the following information. Approximate values are acceptable. If you do not have time to compile all of this information in advance, bring what you have and your representative will assist you in the compiling process. Strict confidentiality is maintained.

1. Whom do you want to designate as your personal representative (executor)? Alternate?
2. Whom do you wish to name as guardians (if you have minor-aged children)? Alternates?
3. What family members do you want to include as beneficiaries? Non-family members?
4. What Christian ministries do you want to include as beneficiaries?
5. What distribution plan do you want if you are not survived by your spouse or children?

The role of the estate planning representative is that of an assistant. They will assist you by asking the right questions and by providing options for your selection. All decisions are made by you and those decisions are then prepared in a memorandum for your attorney. From that memorandum, your attorney can prepare your needed instruments (Wills, Trusts, etc.).

### **III. DUTIES OF EXECUTOR/PERSONAL REPRESENTATIVE**

1. Arrange for probate of the Will.
2. Obtain court authorization as the Personal Representative.
3. If required, post a BOND for the faithful performance.
4. Transfer bank accounts to the account of the estate.
5. Take custody of securities.
6. Collect life insurance payable to the estate.
7. File claims for Social Security and/or Veteran's benefits.
8. Collect debts owed to the estate.
9. If the estate contains a going business, steps must be taken to keep the business operating while arranging for a sale or its future continuation.
10. Locate and safeguard all other property and property interest belonging to the estate.
11. Make a complete and detailed inventory.
12. Have all the assets appraised.
13. Figure out how much money must be paid out in cash bequests first, then for taxes and finally other costs.
14. Decide what property has to be sold in order to raise cash.
15. Decide when to sell the property.
16. Defend the estate against improper claims.
17. Pay all legitimate debts against the estate.
18. Record all the receipts, transactions and disbursements.
19. File a final income tax return for the deceased.
20. File income tax returns for the estate.
21. Select a fiscal or calendar year for income tax purposes.
22. File a Federal Estate Tax return within the time period involved after a decision is made whether to use the alternate valuation date.
23. If funds are available, pay bequests and legacies as directed by the Will.
24. Make a final accounting to the court and give notice thereof to all interested parties.

## IV. MINISTRIES OF THE WESLEYAN CHURCH

A common practice among Christians is the inclusion of Christian ministries in estate plans. Just as one supports the work of God during his or her lifetime, so it is fitting to provide for such ministries through estate planning. On this page is a listing of various Christian ministries within The Wesleyan Church. Acquaint yourself with what the Church is accomplishing and allow God to direct you in determining which ministries you should include in your estate plan.

- A. Your LOCAL Wesleyan church
- B. District Church planting and special projects
- C. Your Wesleyan educational institutions:
  - 1. Bethany Bible College, Sussex, New Brunswick, Canada
  - 2. Houghton College, Houghton, New York
  - 3. Indiana Wesleyan University, Marion, Indiana
  - 4. Oklahoma Wesleyan University, Bartlesville, Oklahoma
  - 5. Southern Wesleyan University, Central, South Carolina
- D. General Church Ministries:
  - 1. Education & the Ministry
  - 2. Evangelism & Church Growth
  - 3. Global Partners ~ Wesleyan World Missions
  - 4. Hephzibah Children's Home
  - 5. Ministerial Scholarship Fund
  - 6. Spiritual Formation
  - 7. Stewardship Ministries
  - 8. The Wesleyan Church
  - 10. The Wesleyan Life
  - 11. Wesleyan Investment Foundation (WIF)
  - 12. Wesleyan Medical Fellowship
  - 13. Wesleyan Men
  - 14. Wesleyan Pension Fund
  - 15. Wesleyan Publishing House
  - 16. Wesleyan Women
  - 17. World Headquarters Archives
  - 18. World Hope International

In addition to providing financial support for these ministries, join us in praying for them. Each ministry is important. Additional information regarding these ministries is available upon request from the Office of Stewardship Ministries.



# Estate Planning Data Guide

Today's Date (m/d/y): \_\_\_\_\_

*For additional explanations or comments about any question, please use reverse of page*

**My name:** \_\_\_\_\_

Title                      First                      Middle                      (Maiden)                      Last

My birth date: \_\_\_\_/ \_\_\_\_/ \_\_\_\_      Soc. Sec. No. \_\_\_\_-\_\_\_\_-\_\_\_\_

U.S. Citizen?    Yes / No

Marital Status:     Married, spouse living                      Anniversary (current marriage): \_\_\_\_/ \_\_\_\_/ \_\_\_\_

Spouse deceased                      Date of death: \_\_\_\_/ \_\_\_\_/ \_\_\_\_

Divorced                      Date of final decree: \_\_\_\_/ \_\_\_\_/ \_\_\_\_

(for more than one previous marriage, please use reverse of page)

Never married

**My spouse:** \_\_\_\_\_

Title                      First                      Middle                      (Maiden)                      Last

Spouse birth date: \_\_\_\_/ \_\_\_\_/ \_\_\_\_      Spouse Soc. Sec. No. \_\_\_\_-\_\_\_\_-\_\_\_\_

Is spouse a U.S. Citizen? Yes / No

Spouse Status:     This is the first marriage for my spouse

My spouse was widowed before this marriage

My spouse was divorced before this marriage

**Street Address:** \_\_\_\_\_

**City, State and Zip Code:** \_\_\_\_\_ **County** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **e-mail:** \_\_\_\_\_

This is a general estate and financial planning data form. This is not a will or legal document. The information on this form will remain confidential between your attorney and financial advisor.

**I think the best planning for me/us is:**

- Will Planning for Husband and Wife ..... \$275
- Will Planning for Individual..... \$200

*'Will Planning' includes Will, Living Will and POAs*

- Powers of Atty for Health Care ..... \$50
- Durable Powers of Atty/Finances..... \$50
- Living Wills (Advance Directives) ..... \$50
- Revocable Living Trust Planning..... \$650

**Qualification for Discounted Fees**

- **Will Planning – \$99 (C) \$69 (S)**
- **Trust Planning - \$325.00, plus recording fees**

I have included a bequest of at least 10% to any Wesleyan ministry as noted on page 6. (Local or international)

I am a Wesleyan pastor, or in full-time ministerial service to a Wesleyan church or ministry.

*'Trust Planning' includes Trust Agreement, Pour-over Will, Powers of Attorney for Finances and for Health Care, and Living Will, plus up to two Deeds. Deed Recording fees are extra and paid by client on invoice.*

**Fees for Special Situations and Tax Planning provisions are extra and dealt with case-by-case.**

**Living Children of this marriage:**

- A) \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ M or F  
Full Name City and State (if not living with you)
  - B) \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ M or F  
Full Name City and State
  - C) \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ M or F  
Full Name City and State
- (if more, please list on reverse)

**Predeceased Children:**

- A) \_\_\_\_\_ DOD \_\_\_\_/\_\_\_\_/\_\_\_\_ M or F  
Full Name City and State
  - B) \_\_\_\_\_ DOD \_\_\_\_/\_\_\_\_/\_\_\_\_ M or F  
Full Name City and State
- (if more, please list on reverse)

**Living Children of prior marriages:**

- A) \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ M or F  
Full Name City and State (if not living with you)
  - B) \_\_\_\_\_ DOB \_\_\_\_/\_\_\_\_/\_\_\_\_ M or F  
Full Name City and State
- (if more, please list on reverse)

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**Guardian of Minor Children**

In the event of your death, your spouse is the guardian of the minor children of your marriage. If your spouse does not survive you, you should appoint an alternative. Normally, the person with physical custody of the child will also handle the child’s financial matters. If you wish to divide these responsibilities among more than one person, please list your wishes on the reverse of this page.

First Choice. \_\_\_\_\_ Bonded? Y / N  
Full Name (individual or couple) City and State

Alternate \_\_\_\_\_ Bonded? Y / N  
Full Name (individual or couple) City and State

**Settling My/Our Estate at Death** (an X means “Yes”)

If my spouse is living when I die, I want my spouse to settle my affairs.

I do not wish to require a bond or insurance if my spouse is settling my affairs.

If your spouse does not survive you, or is unwilling or unable to handle your affairs, you should appoint an alternative. You may name a close friend or adviser with good business or financial sense, or, as is common, you may name one of your adult children.

First Alternate \_\_\_\_\_ Bond? Y / N  
Full Name City and State

**Power of Attorney (For Business and Financial Matters and for Health Care)**

The Power of Attorney we provide authorizes another person to act on your behalf in matters of your finances and concerning your health care, **but only in case you are disabled** to the point where you cannot make such decisions yourself. Normally, a spouse is named first, then an alternate (which may be an adult child or other trusted adviser):

**Power of Attorney (after spouse)**

1. \_\_\_\_\_ Health Care Finances Both  
Name City and State

**Alternate Power of Attorney (if you wish to name different person for Health Care or for Finances)**

2. \_\_\_\_\_ Health Care Finances Both  
Name City and State

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<b>Approximate Gross Value of Estate:</b>	<b>Myself</b>	<b>My Spouse</b>	<b>Total</b>
Property held jointly (real estate / personal / business) .....			\$ _____
Separate Property (inheritance / business / other)	\$ _____	\$ _____	\$ _____
Life Insurance .....	\$ _____	\$ _____	\$ _____
IRA/Pension/Retirement .....	\$ _____	\$ _____	\$ _____
Other .....	\$ _____	\$ _____	\$ _____
<b>Total</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>

If you own property for which you can find no listed category, please list it on the reverse of this page. Include a description, who owns it and an approximate gross value. (If your totals above exceed or approach \$3.5 million, we will contact you to determine your potential exposure to Federal Estate Tax and your wishes concerning that possibility)

**Distribution of My Estate** (please mark an “X” on all that apply)

• **Tangible Personal Property, Household Items, Vehicles, Etc.**

These specific items of my property (heirlooms, sentimental items, promised items) are to go to the following persons: (List item, followed by person, city and state. Use reverse, if necessary)

\_\_\_\_\_

• **Remainder of Property, Real Estate, Bank Accounts, IRAs, Life Insurance, etc.**

**Everything else to my spouse, if my spouse survives me.**

If I am single, or if my spouse does not survive me:

\_\_\_\_\_%, or \$\_\_\_\_\_, to my LOCAL Wesleyan Church \_\_\_\_\_

\_\_\_\_\_%, or \$\_\_\_\_\_, to the following Wesleyan Ministry \_\_\_\_\_

\_\_\_\_\_%, or \$\_\_\_\_\_, to this person, church or charity \_\_\_\_\_

Please consider a gift of 1% or \_\_\_\_\_ %/\$ to the ministries of Stewardship Ministries | Estate & Gift Planning of The Wesleyan Church. (If no bequest checked above to SM: \$1 will be the distribution to SM)

**All the rest to my children (or their children, if predeceased), in equal shares**

(if children are to receive unequal amounts, please list specific desires below or on a blank page)

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Contingency Plan:** If I leave no family surviving me, I wish to distribute my estate as follows:

\_\_\_\_\_  
 \_\_\_\_\_

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## *Authorization and Waiver*

1. The Office of Stewardship Ministries and its representatives do not engage in the practice of law. They do not create wills, trusts or other legal documents, nor do they perform services in the administration of trusts or estates to the extent that such activities are considered the practice of law. If this form was provided to me by any person other than Darrin Gowan, that person does not necessarily engage in the practice of law, and should not be relied upon to provide legal advice.
2. I am associated with a local Wesleyan Church **or**, I possess sincere charitable intent toward the Church or Church missionary project or a Church educational institution
3. I may freely select any attorney I wish to prepare legal documents for my estate planning and I have voluntarily chosen the services of an attorney. I am responsible for the cost of preparing the legal documents that I request.
4. I authorize the Office of Stewardship Ministries, and its representatives, to provide my estate planning information to attorney Darrin Gowan for the purpose of preparing legal documents after my instructions and desires. I have chosen voluntarily to distribute the assets of the estate as listed in the foregoing form.
5. Darrin Gowan is a duly licensed attorney, admitted to practice in the State of Indiana. I agree that, in requesting him to prepare my legal documents, Mr. Gowan will be acting for me and on my behalf as my attorney. I am entitled to all professional legal rights, confidences, and attorney-client privileges, even as against the Office of Stewardship Ministries and its representatives.
6. Mr. Gowan will draft appropriate documents based upon the information I have provided, and by any further consultation Mr. Gowan deems necessary. To the extent allowed by law, I release the attorney from liability for drafting errors based on faulty or misleading information I have provided.
7. I will be advised how to properly execute my documents (and transfer my assets to a trust, if necessary.) Upon delivery of the documents, Mr. Gowan's representation of me as my attorney for these matters shall cease, *but he may release, and the Office of Stewardship Ministries may maintain, a copy of my documents for safe-keeping and my future reference.*
8. If my desires and instructions include donations to charities, educational institutions or religious ministries, I authorize Mr. Gowan to notify the recipient of the gift.
9. I intend to execute the requested documents as soon as possible after I receive them. I agree to pay the accompanying invoice immediately. A fee schedule has been disclosed to me and I agree to abide by its terms. Fees will be paid to Mr. Gowan only, and not to the Office of Stewardship Ministries.
10. I agree to notify Mr. Gowan (by return mail, phone or e-mail) of the date the documents are/were signed, and where they will be stored.

\_\_\_\_\_  
Signature

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature

Dated: \_\_\_\_\_

### **Donor Information Release**

Unless marked NO, the Stewardship Ministries Office may archive an (unsigned) copy of my estate planning documents for my convenience and safe-keeping. NO\_\_\_\_

Unless marked NO, the Stewardship Ministries Office may share the fact of any charitable gift I have made with the charitable or religious organizations I have chosen to benefit. NO\_\_\_\_

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Stewardship Ministries of The Wesleyan Church  
PO Box 50434  
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**The Wesleyan Church Planned Giving Program:**

**THE WESLEYAN CHURCH CHARITABLE PARTNERSHIP**

**LETTER OF INTENT**

Please enroll me as a Wesleyan Church Charitable Partner. To help insure the continuation of building the Kingdom of Christ through the ministries of The Wesleyan Church, I acknowledge my strong belief and confidence in the ministries of The Wesleyan Church by making a commitment as indicated below:

- I have made a provision for The Wesleyan Church in my will.**
- I will make a provision for The Wesleyan Church as indicated below:**
  - A Bequest in a Will or Living Trust
  - Creation of a Charitable Gift Annuity
  - Creation of a Charitable Trust
  - Donation of a Life Insurance Policy
  - Other, please specify: \_\_\_\_\_

**Optional:** Estimated present value of gift(s) \$ \_\_\_\_\_

- I would like more information on ways to help. Please send me information regarding:**
  - Charitable Gift Annuities
  - Wills / Bequests
  - Other \_\_\_\_\_

***This Letter of Intent is not a legal obligation and may be changed at my discretion.***

**Please complete the following information:**

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

**Address**

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

- I wish to remain anonymous

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## THE WESLEYAN CHURCH CHARITABLE GIFT ANNUITY

*We are all familiar with the idea that in the act of giving we receive more than we thought imaginable. Most of us experience the reality of this truism early in life -- through the eyes of a child, the gratitude of a life changed, or through the vision that is inherent in the spirit of giving.*

*Some may find it surprising that U.S. tax laws take this reality one step farther and provide tangible evidence that a gift changes much more than the charity on the receiving end.*

*It is with purpose that our laws embrace planning strategies like the Charitable Gift Annuity, offering measurable incentives which nurture a generous society.*

### **A WIN-WIN PROPOSITION**

***The Wesleyan Church Charitable Gift Annuity*** is a perfect example of how our tax laws continue to provide special ways for you to accomplish two objectives with one asset. In fact, a close look at the Gift Annuity reveals a true *win-win proposition*.

The Charitable Gift Annuity makes it possible for you to receive high returns on an asset for the rest of your life.

But that only tells half the story. The Charitable Gift Annuity ultimately results in a charitable contribution to a Wesleyan ministry of your choice, preferably your local Wesleyan Church. So, while you can take steps to secure a high annuity payment for the rest of your life, you can also realize your giving goals.

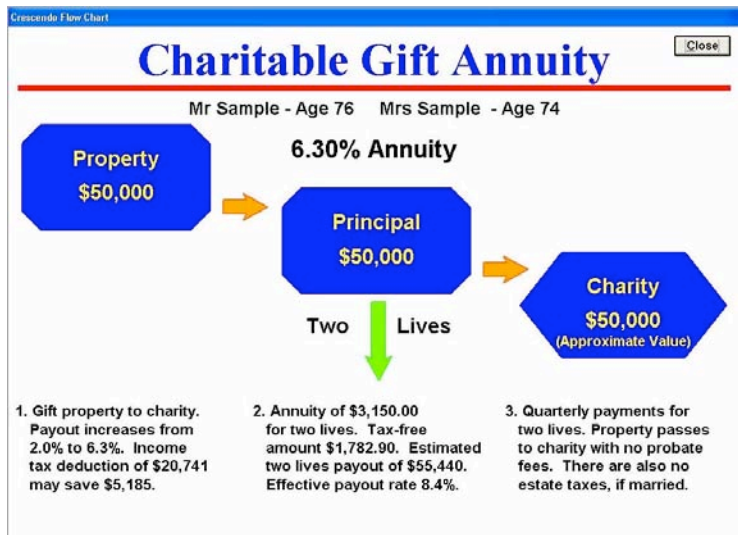
### **HERE'S HOW THE CHARITY GIFT ANNUITY WORKS**

It's simple really. We'll send you a Charitable Gift Annuity Agreement in exchange for your contribution (check, stock or bonds or any appreciated asset). Each year for the rest of your life we'll mail payments to you. Or, if you prefer, the agreement can run for the lives of you and your spouse.

A Gift Annuity is a contract and payments are backed by all the assets of the Charity. So you can be confident that the Gift Annuity will provide the income you count on. In addition, two tax benefits add value to the Gift Annuity. First, you'll receive a current income tax deduction -- something you'll appreciate when you file this year's tax return. And second, part of each annuity payment we make to you may be tax free!

The illustration shows how the agreement works. Once established, income payments are made for life. Annuity rates -- the rate for income payments made to you -- are based on age and are higher for more senior persons.

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(for illustration purposes only)

With the benefits of high payment rates, reduced taxes, and an ultimate gift to a Wesleyan ministry, it's easy to see why so many friends consider ***The Wesleyan Church Charitable Gift Annuity*** to be the ultimate *win - win proposition!*

For more information and a personalized CGA proposal, please provide the following information:

1. Name \_\_\_\_\_
2. Street \_\_\_\_\_
3. City \_\_\_\_\_
4. State / Zip \_\_\_\_\_
5. Phone \_\_\_\_\_
6. E-mail \_\_\_\_\_
7. Birth Date 1st \_\_\_\_\_
8. Birth Date 2nd \_\_\_\_\_
9. Asset Value \_\_\_\_\_
10. Cost Basis \_\_\_\_\_

Send the above information to Stewardship Ministries at PO Box 50434, Indianapolis, IN 46250 or email the information to [StewardshipMinistries@wesleyan.org](mailto:StewardshipMinistries@wesleyan.org) or call 800.627.2537

*(This information is provided as an educational service. Personal advisors should always be consulted in the planning process.)*

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