

WHAT IS THE ST. FRANCIS ENDOWMENT FUND?

The St. Francis Endowment Fund was established in 2008 for the purpose of providing members and friends with the opportunity to make charitable gifts to Saint Francis that would become a permanent endowment of financial support. These gifts are intended for purposes which are not funded through the annual operating budget and help to carry out the mission of St. Francis in the Foothills, today and for future generations.

The St. Francis Endowment Fund is invested and managed by the Desert Southwest United Methodist Foundation. Your gift to the Endowment Fund will provide income in perpetuity for St. Francis. While the principal of the Endowment Fund remains intact and untouched, the earnings of the Funds may be distributed at the discretion of the Endowment Fund Committee.

Twice a year, when earnings are available, the St. Francis Endowment Fund Committee considers dispersing funds. Applications for funds will be considered in the following areas: Mission, Scholarship, Property, Ministry or Special Need.

HOW TO GIVE?

~ LEAVE A BEQUEST TO THE ST FRANCIS ENDOWMENT FUND IN YOUR WILL OR TRUST

(Bequest language below)

~LIST THE ST. FRANCIS ENDOWMENT FUND AS (Full or Partial) BENEFICIARY ON YOUR:

- LIFE INSURANCE POLICY

-PENSION, IRA, 401(k), 403(b)

~TRANSFER STOCKS or BONDS, IRA ROLLOVER

~REAL ESTATE (Survivorship Deeds are available in Arizona)

~CHARITABLE TRUST, RETIREMENT EARNINGS, CASH

NEED MORE INFORMATION?

For more information about the St. Francis Endowment Fund, Contact the endowmentfund@stfrancisumc.org or call the St. Francis Office 520-299-9063

For more information on which types of giving would be best for you, contact an estate lawyer or tax advisor.

More information about the Desert Southwest United Methodist Foundation can be found at www.dsumf.org

*St. Francis in the Foothills UMC is a nonprofit, tax-exempt charitable organization (tax identification number 86-0388672) under Section 501 (c) (3) of the Internal Revenue Code.

Examples of Bequest language

(Feel free to change the numbers or percentages as you desire.)

1. Bequest of cash

"I bequeath the sum of \$10,000 to "St. Francis UMC Endowment Fund (tax ID 86-0388672)"

2. Bequest of a percent of your estate

"I devise and bequeath 20% of the remainder and residue of property owned at my death, whether real or personal, and wherever located to "St. Francis UMC Endowment Fund (tax ID 86-0388672)"