# *Gift Plans and Services*

*Helping you make the most of your charitable giving*

THE FULLER CENTER FOR HOUSING
*Building on Higher Ground*

For donors seeking broader avenues of charitable giving, The Fuller Center recommends Mennonite Foundation, described below.

For nearly five decades, Mennonite Foundation has helped individuals to become more faithful stewards of their financial resources.

Your gifts to the foundation can be made through a charitable bequest in your will or as a gift made during your lifetime. The foundation can accept gifts of cash, securities, real estate or commodities. While your gifts to the foundation are irrevocable, you do maintain an ability to recommend how those donations should be distributed.

Through our regional representatives and a dedicated home office staff, the foundation offers donors a variety of gift plans and services to meet most charitable giving needs.

### Charitable bequest plan

As part of your will or revocable living trust, you can designate Mennonite Foundation as a charitable beneficiary. This designation provides a tax deduction for your estate and a convenient means to benefit your recommended charities after your death, such as The Fuller Center. The charitable bequest plan provides donors with a recommendation form on which to designate charitable distributions. It is a form which can be easily updated without incurring the expense associated with changing a will or revocable living trust.

### Charitable gift fund

Designed to address the modern tax advantages of charitable giving, this donor-advised fund is structured to make sharing your financial gifts simple. The fund can accommodate a one-time gift, or multiple gifts over a period of years. As with all our gift plans, the power of your donation is magnified by giving appreciated assets. Such a gift avoids the burden of capital gains taxation, leaving more dollars to benefit The Fuller Center or other favorite charity.

### Charitable gift annuity and charitable remainder trust

By establishing either of these plans with Mennonite Foundation, your dollars will be invested in a socially responsible way, providing a stream of payments for your lifetime. Upon the death of the plan's last income beneficiary or annuitant, the remaining assets will be distributed to The Fuller Center and other recommended charities. As with all our gift plans, distribution recommendations can be changed at any point during your lifetime.

To learn more about Mennonite Foundation gift plans and the tax advantages associated with donations to the foundation, contact your regional foundation representative, or call the foundation main office at (800) 348-7468.

**The Fuller Center for Housing**
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**Mennonite Foundation**
Joseph Lapp
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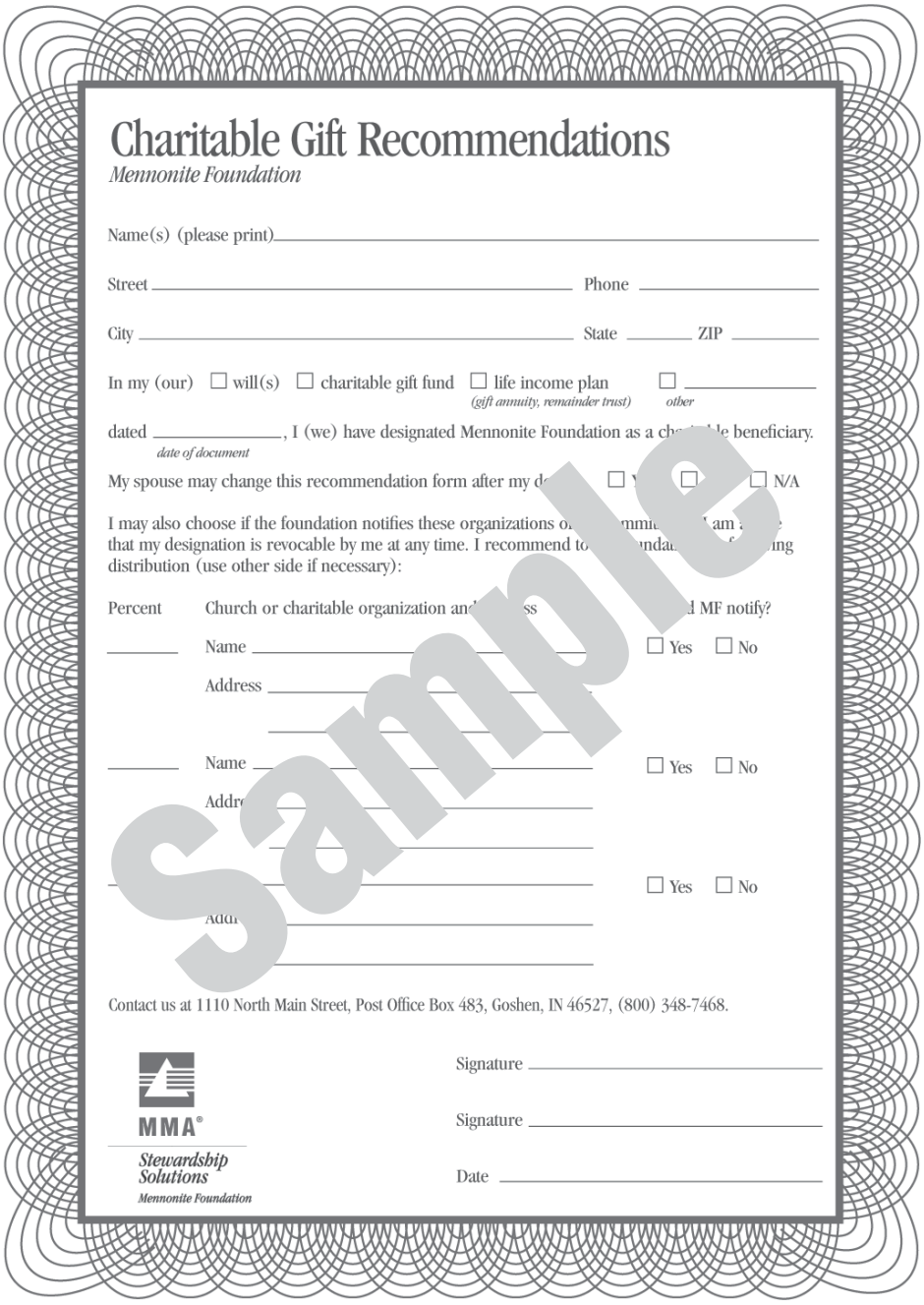

# Charitable Gift Recommendations

*Mennonite Foundation*

Name(s) (please print) _____

Street _____ Phone _____

City _____ State _____ ZIP _____

In my (our) ☐ will(s) ☐ charitable gift fund ☐ life income plan ☐ _____
*(gift annuity, remainder trust)* *other*

dated _____, I (we) have designated Mennonite Foundation as a ch[illegible]le beneficiary.
*date of document*

My spouse may change this recommendation form after my d[illegible] ☐ Y[illegible] ☐ [illegible] ☐ N/A

I may also choose if the foundation notifies these organizations o[illegible]mmi[illegible] am a[illegible] that my designation is revocable by me at any time. I recommend to [illegible]ndat[illegible]ing distribution (use other side if necessary):

| Percent | Church or charitable organization and[illegible]ss | [illegible] MF notify? |
|---|---|---|
| _____ | Name _____ | ☐ Yes ☐ No |
| | Address _____ | |
| _____ | Name _____ | ☐ Yes ☐ No |
| | Addr[illegible] | |
| _____ | _____ | ☐ Yes ☐ No |
| | Addr[illegible] | |

Contact us at 1110 North Main Street, Post Office Box 483, Goshen, IN 46527, (800) 348-7468.

MMA®
*Stewardship Solutions*
*Mennonite Foundation*

Signature _____

Signature _____

Date _____

2020443

Sample

## Act today!

**To request an application, or for more information, contact Kirk Lyman-Barner from The Fuller Center at (229) 924-2900 or Joseph Lapp from Mennonite Foundation at (800) 442-7930.**

**We'll show you exactly what annuity rate and tax savings you would receive if you give a gift – and help you decide if a gift annuity is right for you.**

The Charitable Gift Recommendations form provides donors a simple way to recommend the ultimate charitable beneficiary of their donations. The form can be easily updated to reflect changes in the charitable recommendations.

*Provided by The Fuller Center in association with Mennonite Foundation.*