

About Planned Giving

Planned giving does not have to be complicated. It is simply a way to plan ahead so that your gifts do the most good for the people and ministries you care about. Through the WMU Foundation, your planned gifts ensure the growth of Baptist missions and ministry work that you have spent your life supporting. Each gift, regardless of the amount, makes a world of difference.

Most planned gifts are made through a simple will, but there are additional options. A financial advisor can help you decide if other planned giving methods, like the ones listed below, may be best for your individual situation.

- A simple will
- Charitable Gift Annuities
- Trust
- Life Insurance and Retirement Plans

Q: What if I don't have a lot of money to give?

A: Whether you believe you have a lot of money or not, it is wise to make plans for the future. Everyone needs a will so your family will know your wishes. You can often avoid certain estate taxes* by planning ahead so that whatever remains after you pass away can be used effectively.

*A financial advisor can give you specific information on planned giving and taxes.

Q: How do I know how much money I will need in my later years or how much will be left over when I am gone?

A: No one is certain exactly how much money will remain at the end of their life. You can make your plans in a way that takes care of your loved ones first and then benefits charity. Planned gifts like Charitable Gift Annuities can even help provide extra income during your retirement years.

Q: When is the best time to write my will or think about planned gifts?

A: Right now is the best time. Do not wait for a crisis. You can always make changes to a will in the future, but there is no better time than now to make your plans.

Q: How do I know where to start?

A: A trusted financial advisor can help you begin the process, and the WMU Foundation is able to offer advice.

You can call our office at (205) 408-5525.
Many state Baptist Foundations will also help you with planned giving questions.