



Planning a Meaningful Legacy

Wills, Trusts, and Charitable Giving

You will be enriched in every way so that you can be generous on every occasion, and through us your generosity will result in thanksgiving to God.

- 2 Corinthians 9:11

When should I make an estate plan? When you want to be in control of your legacy, it's a good time to plan.

The year was 2013. My wife Melanie and I were looking forward to our first international trip – ten days in Ireland. Castles, cliffs, and culture awaited our arrival. The more we learned about the itinerary, the more excited we were to explore the Emerald Isle.

While making plans for our stay, we also had plans to make while we were away. Our two girls were seven and four at the time, and they were not going to be traveling with us. Family members were happy to care for them while we were traveling, but my wife reminded me that this was only part of the preparations we needed to think through prior to leaving.

As we were planning to be gone, we had to consider what would happen if something went wrong. What if there was an accident? What if we were hurt...or worse? How would our girls be cared for if we were no longer here? Though unlikely, we needed a plan. We may have only been in our mid-30's, but it was our responsibility to ensure our girls would be cared for if disaster struck.

So, we began work on an estate plan. We appointed guardians and established a financial distribution plan for the girls' care and support. We thought short-term and long-term. While we started the process assuming we didn't have enough assets to merit a trust, we learned how trusts really work and about the advantages in administrating them to care for dependents. Plus, we made plans for a charitable component. A trust mechanism ended up working best for our family.

Scripture tells of faithful people praying and preparing. God calls us to be good stewards and thoughtful planners. That's what estate planning is all about - praying, preparing, and stewarding – **and anytime is a good time to make proper preparations.**

I invite you to partner with us as you plan and pray for what God is calling you to do with the resources you have been entrusted. I look forward to the opportunity to walk alongside you during this process.

Thank you for your consideration.

Blessings,



Tyler Curtis
Chief Development Officer



Every adult needs a plan to settle their earthly affairs. From a faith perspective, we believe it is our responsibility to serve as good stewards of God's many gifts. Stewarding requires proper planning.



How does KMF assist me with my estate planning needs?

Whether you need to create your plan for the first time or update documents previously created, we can help, at no cost to you.

KMF will assist you in preparing or updating your estate by:

- Educating on options to guide the administration of your assets.
- Explaining the need for Durable Powers of Attorney for both health and finance, Living Wills, and Last Will and Testament documents.
- Sparking considerations related to your assets and optimal ways to distribute them to heirs and charity.
- Connect you with an estate attorney to put your plan in place.

To draft your plan, we partner with a number of expert estate planners to minimize income, gift, estate and inheritance taxes and facilitate smooth business, farm, and asset transitions. Our process will ensure your time with the attorney is spent in the most efficient, economical way possible, keeping your costs to a minimum.

Why would I include a charitable gift in my estate plan?

One common denominator of all who leave a charitable gift is a sincere desire to give back to your church, the community, or a particular ministry. In addition to providing for heirs, charitable giving is part of your legacy.

One key advantage of using KMF to care for your charitable bequest is we can receive and then distribute the funds according to your wishes, per your fund agreement. You can impact your church, other Methodist organizations and ministries, and any 501(c)(3) non-profit – all via the single fund you establish. The beneficiaries of your charitable fund can be updated at any time, free of charge, without going back to your attorney to amend your plan.

Plans fail for lack of counsel, but with many advisers they succeed.

- Proverbs 15:22



What does this process look like?

- 1.** A KMF representative will work with you to answer questions, explain options, and collect needed background information to assist you in the preparation of your estate plan.
- 2.** KMF will help connect you with an estate planning attorney if you do not have an attorney of your own.
- 3.** You will work with the attorney to finalize your documents.
- 4.** If you desire to give a portion of your estate to charity, KMF will work with you to create a fund and direct your gifts according to your wishes.
- 5.** With your permission, you, your attorney, and a KMF representative will review your plan upon its completion.
- 6.** After your plan is complete, KMF will help you to review and maintain your plan. We encourage you to review your plan every 5 years.

Let's Get Started

The first step is scheduling a time to talk with Tyler Curtis, Chief Development Officer of the Kansas Methodist Foundation. Email him at tyler@kansasmethodistfoundation.org or call (620) 664-9623.