

**Ardmore United Methodist Church**

200 Argyle Rd, Ardmore, PA 19003

Office - 610-649-4382

[aumeth@verizon.net](mailto:aumeth@verizon.net) / [www.ardmorechurch.com](http://www.ardmorechurch.com)

Rev. Timothy Thomson-Hohl, Pastor

610.306.3709 (cell) - [thomhaht@aol.com](mailto:thomhaht@aol.com)

Rev. Donald R. Williams, Pastor Emeritus

**Gifts that create a steady stream of income for the donor**

- ▶ **Immediate Fixed Income Lifetime Annuity with Cash Refund** - Popular with seniors who are focused on receiving a steady stream of income; guaranteed for the life of the donor/donor and spouse.
  - Example: 65-year-old donor would receive an approximate 6% annual return on their annuity which is guaranteed for their lifetime
  - The later in life the annuity payments begin the higher monthly payout
  - A significant portion of this income stream may be tax free and the donor may also benefit from a tax deduction
  - If the annuitant should pass away prior to the original investment being repaid, the unpaid balance is paid to the beneficiary (beneficiary may be individuals and/or charitable organizations)
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- ▶ **Deferred Fixed Lifetime Annuity with Cash Refund** - this is similar to the immediate annuity above. However, the start of the annuity payment is deferred to a specific date in the future. This is geared toward individuals who are 40-60 years old who will benefit from income after retirement. Deferral of payments permits a higher annuity rate.

Annuities are available through many sources. Parishioners may wish to consider the following low cost options. These organizations have a dedicated staff prepared to discuss and further explain details involving these and other annuity products geared toward your specific income needs.

- The Vanguard Group: Annuity Sales Representative, Richard Tucker 800-357-4857 Ext. 25971
- Fidelity Investments: Annuity Sales, Ken Robinson, 800-343-3079, Ext. 15973
- USAA: Annuity Sales Eric Nelson, 800-531- 8722 Ext. 24073

*Note: The above list is only a personal recommendation from one of our members, who has spoken with each of the above noted individuals and found them to be very helpful and knowledgeable. You will have to decide which options are right for you.*

If you wish to honor The United Methodist Church with such a pledge, please complete the attached "**Planned Giving**" intent form and submit it to the church office.

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**ARDMORE UNITED METHODIST CHURCH PLANNED GIVING INTENT FORM**

Date: \_\_\_\_\_

Name of Donor(s): \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone number: \_\_\_\_\_

Dear members of the Church Finance Committee,

Please be advised that it is our intention to purchase a Fixed Income Annuity through \_\_\_\_\_  
and plan to include The Ardmore United Methodist Church as a beneficiary.

It is my/our wish that any funds received by the church be directed toward the following mission(s):

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

I further understand that this represents a pledge and does not legally bind me to fulfill such an obligation.