

1 LEARN

What legacy giving really is:

As you plan your gift, please know that planned giving is far more than a transaction, it is...

OPPORTUNITY... for you who care so deeply for this mission and want to continue energizing opportunities, even after your lifetime.

THE GIFT OF OUR LIFETIME... for you who are using your assets fully today – like your financial, personal and real assets. After our lifetime, most of us have the opportunity to make the largest and therefore the most impactful gift of our lives.

LEADERSHIP... for you whose generous decisions and actions have been witnessed by others. Your planned gift may inspire others to explore how they also can be a resource to those who come next.

THANK YOU
for considering your legacy here.



**We are here
to help.**

Please contact us
to learn more
about your legacy
here.

**Endowment
Committee**
(714) 777-6822



YORBA LINDA
PRESBYTERIAN CHURCH

19301 East Yorba Linda Boulevard | Yorba Linda, CA 92886
(714) 777-6822
info@ylpc.org

Steps to a
LEGACY GIFT



YORBA LINDA
PRESBYTERIAN CHURCH

2 DESIGN

Your Gift

Your financial picture is unique, and so is your planned gift.
Planning your gift may enable you to send more into action or to protect more future value for you and your family. Here are some of the more common gifts that you might consider:

Bequest: Make a gift after your lifetime through your will or trust. This can be a fixed dollar amount, a specific asset, or a percentage of your estate.

Retirement Account: This can be the most heavily taxed asset in many estates. Choosing this as your gift might leave your less tax-burdened assets to your loved ones.

Real Estate: Contributing property after your lifetime or when it is no longer needed can be a game-changing gift.

Charitable Trust: Trusts can combine flexible benefits including a generous income, tax benefits and a powerful gift to the theatre.

Other: Many other giving opportunities might prove ideal for your situation.

Action

Estate and asset planning often requires help.

In order to make sure a particular planned gift fits your situation, we suggest that you **consult with your professional advisor** on how this gift would fit into your plans.

3 IMPACT

What Your Gift Can Do

Your gift can have a major impact on Yorba Linda Presbyterian Church. It will allow the church to cover expenses that are not usually covered by the annual budget which includes payroll, facilities, and ministry activities.

When considering a legacy donation think about how you would like to make your contribution. There are two primary funds for you to leave your donation:

- Endowment Fund
 - The Endowment Fund generates annual income based on a distribution formula.
 - The income is used to support the life and ministry of the congregation.
 - The past four annual distributions totaled \$14,680.

OR

- General Operating Fund
 - Previous gifts have had a major impact on the church:
 - A new sound system was installed in the sanctuary.
 - The parking lot was repaired.
 - The youth lounge was remodeled.

No matter how you decide to contribute your gift, know it will help YLPC continue its ministry to help and serve the congregation and people of Yorba Linda and beyond.

4 TEACH

Generosity

We teach by demonstrating our values through words and actions. Now that you have planned a legacy, consider sharing the why of your gift. It may serve to amplify the power of your generosity.

Consider sharing the news of your gift with us. Advance knowledge of your gift helps us to prepare for and understand your intentions.

This helps us put your gift to work as quickly and efficiently as possible. It also lets us share our heartfelt gratitude for your generosity and commitment. THANK YOU!



An invitation to join the Legacy Society

The Legacy Society is gathered to lift up and to thank you who share plan your legacy here. It is an opportunity for us to express gratitude for the all that you will make possible through your generosity. Please contact us to share the basic details of your gift. We are excited to have a chance to express our heartfelt gratitude.