

The Brother Van Society
Community United Methodist Church
Bigfork, Montana

“Honor the Lord with your wealth, with the first fruits of all your crops.” Proverbs 3:9

Background: Estate planning may be the single largest act of stewardship that many of us will ever perform. At the core, estate planning boils down to determining how, when, and to whom we will transfer the stewardship of what we have been entrusted with when we can no longer serve as stewards ourselves. This is true for both loved ones and the charitable organizations we have supported in the past and wish to support for their future.

Purpose:The Brother Van Society is established to provide for the long term preservation and support of Community United Methodist Church by providing a conduit for members or friends who have named CUMC as a beneficiary in their wills or trusts. As individuals or families complete their estate planning process, many realize how blessed they have been and want to share a portion with the Church. The “Brother Van Society” will formally establish a process for maintaining the intent of the givers and provide the necessary information during a potentially difficult time. We suggest you review your gifting intentions with your children, if applicable, your designated trustee, and your attorney.

Implementation:Through joining “The Brother Van Society”, you voluntarily agree to provide CUMC with your general estate gifting plan intent which can be modified at any time. This information will be kept completely private in a sealed envelope in the Church Safe and under the supervision of the individual responsible for financial giving record keeping....currently Rob Petek.To provide consistency, the attached form should be completed, placed in an envelope, sealed, and given to the Church. At the appropriate time, the church representative can contact the designated individual or trustee to offer the assistance of the church and review your gifting intentions.

Charitable Giving through Estate Planning: There are numerous estate plans, however, the two most common are 1) designate a percentage of your estate to CUMC and 2) creating a “child called charity”. The first is simple and easy to administer and provides a true tithing opportunity. The second is to value your charitable giving as you would an additional child. If you have three children, divide the estate gifting plan into quarters instead of thirds. Many families like this approach because it makes a clear statement of the values place on perpetuating and participating in worthy causes that have earned your support during your lifetime.

The Church suggests you work with a qualified attorney or specialist in estate planning as they will know of many options and are able to tailor an estate plan that is based on what you want. Leaving a well-planned and organized estate plan with your wishes clearly stated and providing a strong example of stewardship, will leave a lasting legacy in the minds and hearts of your family.

Gifting Designation: Our church has three designated areas where the funds can be gifted. The first is the general fund or a designated activity within the Church. This provides the current leadership to

utilize your gift in the areas they believe are most urgent or worthy. The second is to gift the monies to the Endowment Fund. This fund does not allow expenditure of the capital but does provide the annual earnings to be forwarded to the Church and included in the annual budget as income and spent accordingly. The third is the newly formed "Brother Van Foundation". This foundation will be directed by five Church members, (Administrative Council Chair, Finance Committee Chair, Trustee Chair, Worship Committee Chair and one at large member.) Monies received will be held in an account that's sole purpose is to provide for CUMC. The advantage versus the Endowment Fund is that these monies, both principal and earnings can be utilized upon the approval of three of the directors. The benefit is for the Church to receive large gifts that will not overwhelm the congregation or discourage on-going stewardship and annual giving. The foundation will allow the church to focus on present and future ministries, while reducing the pressure to "pick a project" when a major gift is received. We are hopeful the Foundation can fund capital improvement activities and building repairs thus reducing the need for special capital campaign fund raising programs. We believe the Foundation will offer short term stability and long term hope for the future.

Membership Honor Roll: An honor roll plaque will be displayed with all individuals or families listed that are participating in The Brother Van Society. The listing is strictly voluntary. An annual event i.e. luncheon or dinner will be held annually to celebrate participation and give thanks to all who participate.

"We brought nothing into the world, and we can take nothing from it." 1 Timothy