



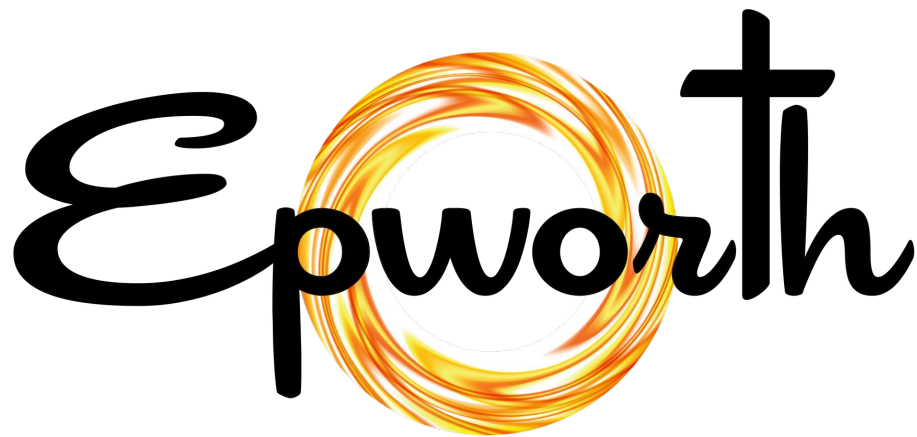
UNITED METHODIST CHURCH  
9008 Rosemont Drive, Gaithersburg, MD 20877



[epworthunited.org/give](https://epworthunited.org/give)



MORE WAYS TO *give*



**United Methodist Church**




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# INFORMATION FOR GIVING

**Legal Name:** Epworth United Methodist Church  
**Address:** 9008 Rosemont Drive Gaithersburg, Maryland 20877  
**Tax ID Number:** 52-1038712  
**Contact Person:** Nancy Laing  
**Phone Number:** (301) 926-0424  
**Email Address:** [nancy.laing@eumc-md.org](mailto:nancy.laing@eumc-md.org)



# DONATE STOCKS & OTHER APPRECIATED SECURITIES

If you want to donate stocks or other securities to Epworth, please send an email to Nancy Laing at [nancy.laing@eumc-md.org](mailto:nancy.laing@eumc-md.org) with the words, "Stock Gift," to receive instructions to donate.

## THINGS TO KNOW:

- When you donate stocks and other securities to Epworth, you support our mission without using money from your bank account.
- Securities are pieces of ownership in companies, like shares of stock, or parts of mutual funds.
- If these securities are worth more now than when you got them, they are called appreciated securities. The extra value is called capital gains.
- By donating appreciated securities to a nonprofit, neither you nor the organization will have to pay taxes on the capital gains. This means you can give more to worthy organizations like Epworth United Methodist Church.



# GIVE FROM YOUR DONOR ADVISED FUND (DAF)

A Donor-Advised Fund (DAF) is a way to give to Epworth and receive tax benefits. It makes giving easier and helps you plan your charitable donations.

Recommend a grant from your DAF to support Epworth by providing your fund administrator with the following information:

- Legal Name: Epworth United Methodist Church
- Address: 9008 Rosemont Drive Gaithersburg, Maryland 20877
- EIN: 52-1038712

To learn more about how DAFs could benefit you, send an email to Nancy Laing at [nancy.laing@eumc-md.org](mailto:nancy.laing@eumc-md.org) with the with the letters, "DAF," in the subject to receive information to point you in the right direction.



# TRANSFER YOUR IRA OR OTHER RETIREMENT ASSETS (QCD)

If you are age 70-1/2 or older, you may make a direct transfer of funds - **up to \$108,000 in 2025** - from your traditional Individual Retirement Account (IRA) to a charitable organization like Epworth. This type of donation, known as a Qualified Charitable Distribution (QCD), allows you to contribute funds directly to Epworth without paying taxes on the amount.

- Normally, distributions from a traditional IRA are taxable when received. With a QCD, however, these distributions become tax-free as long as they are paid directly by the trustee of the IRA to an eligible charitable organization.
- We encourage you to talk to your financial advisor to see if this is the right choice for you. Your generosity can make a significant impact on our mission, all while providing you with potential tax benefits.

If you do decide to make a QCD, please send an email to Nancy Laing at [nancy.laing@eumc-md.org](mailto:nancy.laing@eumc-md.org), with the words, "QCD Template," in the subject to receive a template of a letter to send to your plan provider to enable this donation.



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# MAKE A DOMESTIC WIRE TRANSFER (ACH)

If you want to donate to Epworth with an electronic transfer of funds, you can do so through [GiveButter](#).



# INCLUDE EPWORTH IN YOUR WILL

Leave a portion (a dollar amount or percentage) of your estate to a nonprofit to maintain control of your assets during your lifetime while reducing estate taxes for your heirs.

If you do not have a will yet, it is important that you do so. You can create a will for free at [FreeWill.com](https://FreeWill.com). This is a resource we trust.

## ■ Sample Bequest Language:

"After taking care of all expenses, debts, and other provisions, I give, devise and bequeath \_\_\_ percent of the rest and residue [or \$\_\_\_ if a specific amount] to Epworth United Methodist Church, Federal Tax Identification Number (EIN) 52-1038712, a charitable organization currently with administrative offices at 9008 Rosemont Drive, Gaithersburg, Maryland 20877."

If you already have a will, you can easily amend it by using a codicil. A codicil is a document your attorney can prepare to amend your will or trust without rewriting the entire document. The codicil adds a new gift to Epworth while reaffirming the other terms of your will.





# MAKE EPWORTH A BENEFICIARY OF...

Beneficiary Designations: A beneficiary designation names who will receive your assets - like your home or money in your bank account - after you pass away.

## YOUR RETIREMENT ASSETS

Make Epworth the beneficiary of the unused assets in your IRA, 401(k), 403(b), or pension to reduce estate taxes for your heirs. This only requires completing a new beneficiary designation form. There is no need to modify your will or living trust.

## YOUR LIFE INSURANCE POLICY

Make Epworth the beneficiary of your paid-up policy to reduce estate taxes for your heirs. This only requires completing a new beneficiary designation form. There is no need to modify your will or living trust. You can also transfer ownership of your current policy for an immediate tax deduction.

## YOUR BANK ACCOUNT(S)

Instruct your bank to transfer all or a percentage of what remains in your savings or checking accounts to Epworth at the time of your passing. Your bank can provide you with a beneficiary designation form to complete.



# MAKE EPWORTH A BENEFICIARY OF...

Beneficiary Designations: A beneficiary designation names who will receive your assets - like your home or money in your bank account - after you pass away.

## YOUR INVESTMENT ACCOUNT(S)

Instruct your financial institution to transfer all or a percentage of your investment accounts at the time of your passing. Your broker or agent can explain how to do this. It may be as simple as adding "T.O.D. to Epworth United Methodist Church, EIN 52-1038712" after your name on the account.

## YOUR DONOR ADVISED FUNDS (DAF)s

The final distribution of contributions remaining in a donor-advised fund is governed by the contract you completed when you created your fund. Please consider naming Epworth as a successor of your account or a portion of your account value.