



## BEQUESTS AND ESTATE PLAN GIFTS

A bequest is a **gift from your estate**—a transfer of cash, securities, or other property made through your estate plans. You can make a bequest to Main Street Ministries by including language in your will or living trust leaving a portion of your estate to the Ministry, or by designating Main Street Ministries as a beneficiary of your retirement account or life insurance policy.

Remembering Main Street Ministries with a bequest from your estate will help sustain and strengthen the Ministry in years to come. Some of the advantages of creating a bequest include:

- A bequest costs nothing now, yet gives you the satisfaction of knowing you have provided for Main Street Ministries in the future
- You retain control of and use of your assets during your lifetime
- You may modify your bequest if your circumstances change
- Gifts to Main Street Ministries from your estate are exempt from federal estate taxes
- If you let Main Street Ministries know of your plans, we will be able to thank you now and recognize you.

### ***MAKING A BEQUEST***

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A **bequest to Main Street Ministries** can be made for a specific amount, for a percentage of your estate, or for all or a portion of what is left after you have made bequests to your family. To make a gift to Main Street Ministries from your estate, you must sign a new will or living trust instrument, add a codicil to your present will, or make an amendment to your present trust instrument.


Alternatively, you can designate Main Street Ministries as a beneficiary of a retirement plan or life insurance policy. To do so, contact the retirement plan administrator or life insurance company and complete the appropriate beneficiary designation form. You can designate a specific purpose for such a gift with a separate letter.

### ***PLANNING YOUR BEQUEST***

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When planning for a bequest, you will need to consider how you would like your gift to be used to benefit Main Street Ministries—whether **unrestricted** in purpose or **restricted** to a specific program or purpose.

- An **unrestricted** bequest allows the Ministry to determine how to use the funds based on its most pressing needs. Unrestricted bequests are extremely valuable because the Ministry can use them to flexibly meet its future needs.

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- A **restricted** bequest directs assets to a specific fund, program, or particular purpose. A restricted bequest may be for an expendable or endowed fund. *Because each restricted bequest is unique, Main Street Ministries encourages donors considering this type of gift to speak with a member of the Development Committee about the appropriate language.*

## ***LET US THANK YOU***

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If you have included Main Street Ministries in your estate plans, please let us know. We would like to thank you for your generosity and make sure the purpose of your gift is understood by the Ministry. Please contact Sonja Gee [sgee@msmhouston.org](mailto:sgee@msmhouston.org).

## ***CONTACT US***

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The Main Street Ministries Development Committee is happy to help you explore options for designating a bequest to Main Street Ministries.

Those considering a planned gift should consult their own legal and tax advisors. The MSM Development Committee is happy to speak with advisors as well. Please contact Sonja Gee [sgee@msmhouston.org](mailto:sgee@msmhouston.org).

## ***MINISTRY NAME AND I.D. NUMBER***

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The official name of Main Street Ministries is **MAIN STREET MINISITRIES HOUSTON.**

Main Street Ministries' federal tax I.D. number is **76-0586335.**

