

## Gretna Glen Contact Information

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## We are proud to partner with:

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United Methodist



Foundation

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# Planned Giving

Wills • Bequests • Trusts



**Gretna Glen**  
CAMP AND RETREAT CENTER

*God's place apart. Transforming lives.*

## How Can I Help?



Talk with us. We can discuss your goals and put you in touch with our experts. Or, you can discuss your goals with your own financial advisor. The information for the Mid-Atlantic United Methodist Foundation is on the back of this flyer. They have extensive experience working with our donors to design a plan that is right for them.

## Who Are We?



Gretna Glen Camp & Retreat Center is a ministry of The Eastern Pennsylvania Conference of The United Methodist Church. Camp began in our current location in 1959. Our 200 acres are set aside to serve all people through experiences that bring us closer in relationship with Jesus. Over 10,000 guests come to our site each year for day events, weekend retreats, teambuilding, summer camp and special events.

## Why Gretna Glen?



Deciding to add Gretna Glen to your planned giving is vital to the long term operations of this special place set apart. Our Nancy Raab Memorial Scholarship Fund is an example of what this type of giving can do for this ministry. Each year we use the interest only from this endowment to provide financial support for hundreds of camper families who want their children to have a faith-forming summer camp experience. It is truly the gift that will never end.

## What is Planned Giving?



Do you have a desire to see the Camp & Retreat Ministry grow and continue to touch the lives of tens of thousands each year? Maybe you are currently a supporter of Gretna Glen, or are considering becoming involved in this mission.

There are many types of gifts that fall into this broad type of support. Endowments and legacy gifts are but two categories of gifts that can help sustain and grow this vital ministry. Simply put, an endowment is a gift that is set up in a fund and is used as directed by the donor. A legacy gift or bequest is a planned donation that occurs after a donor's lifetime.

## Methods of Giving



The types of gifts you can make are almost limitless. The real question is: "What type or method of giving is right for you and your situation?"

Gifts can be as simple as a gift of cash or marketable securities or as complex as a Charitable Lead Trust. Some donors consider bequests in their will or a gift of life insurance. Some gifts provide income to the donor during their lifetime and some are tax-advantaged. Some donors already have a planned-giving program in place. Why not consider adding Gretna Glen to your plan?



## CURRENT

## DEFERRED

## LIFE INCOME

	CURRENT			DEFERRED					LIFE INCOME			
<b>Your Gift</b>	Outright Gift of Cash	Outright Gift of Securities	Outright Gift of Personal Property	Bequest in Will	Gift of Life Insurance	Gift of Retirement Assets	Gift of Real Estate	Gift of Retained Life Estate	Charitable Remainder Trust	Charitable Remainder Annuity	Charitable Gift Annuity	Charitable Lead Trust
<b>Your Goal</b>	Make a quick and easy gift	Avoid tax on capital gains	Share your enjoyment of a collection or other personal item	Defer a gift until after your lifetime	Make a large gift with little cost to yourself	Avoid the twofold taxation on IRAs or other employee benefit plans	Make a gift of an asset no longer needed and generate an income tax deduction	Give your personal residence, vacation home or farm now but continue to live there	Create a hedge against inflation over the long term and supplement your retirement income	Secure a fixed income and supplement your retirement funds	Supplement income with steady payments that are partially tax-free	Reduce gift and estate taxes on assets you pass to children or grandchildren
<b>How You Make the Gift</b>	Simply write a check	Contribute long-term appreciated stock or other securities	Donate tangible personal property used for tax-exempt function	Name Gretna Glen in your will (designate a specific amount, a percentage or a share of the residue)	Contribute a life insurance policy you no longer need	Name Gretna Glen as the beneficiary of the remainder of the assets after your lifetime	Donate the property to Gretna Glen, or sell it to us at a bargain price	Deed ownership of your home to Gretna Glen but retain occupancy	Create a trust that pays a fixed percentage of trust's assets as revalued annually	Create a charitable trust that pays you a set income annually	Enter a charitable gift annuity contract with the church that pays a set amount for one or two lives	Create a charitable trust that pays fixed or variable income to Gretna Glen for a specific term of years; principal is retained for heirs
<b>Your Benefits</b>	<ul style="list-style-type: none"> <li>• Immediate income tax deduction</li> <li>• Removes property from estate</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate charitable deduction of full fair market value</li> <li>• Avoidance of capital gains tax</li> </ul>	<ul style="list-style-type: none"> <li>• Charitable deduction based on the full fair market value</li> </ul>	<ul style="list-style-type: none"> <li>• Donation is exempt from federal estate tax</li> <li>• Control of asset for your lifetime</li> </ul>	<ul style="list-style-type: none"> <li>• Current income tax deduction</li> <li>• Possible future deductions through gifts to pay policy premiums</li> </ul>	<ul style="list-style-type: none"> <li>• Make the gift from the most highly taxed assets, leaving more for family</li> <li>• Avoids income and estate tax</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate fair market value income tax deduction</li> <li>• Reduction or elimination of capital gains tax</li> </ul>	<ul style="list-style-type: none"> <li>• Valuable charitable income tax deduction</li> <li>• Lifetime use of residence</li> </ul>	<ul style="list-style-type: none"> <li>• Receive a variable income for life</li> <li>• Immediate income tax charitable deduction</li> <li>• May create succession income to heirs</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate income tax deduction</li> <li>• Fixed payments for life, often at a higher rate of return</li> </ul>	<ul style="list-style-type: none"> <li>• Current and future savings on income taxes</li> <li>• Stable payments for life</li> </ul>	<ul style="list-style-type: none"> <li>• Reduces your taxable estate</li> <li>• Your family keeps the property, often with reduced taxes</li> </ul>

# What Giving Plan is Best for You?

## Giving Worksheet

1. Why do I want to give to Gretna Glen Camp & Retreat Center?
2. When do I want to give to Gretna Glen Camp & Retreat Center?
3. Write down any questions you may have for your financial advisor or the Mid-Atlantic Foundation.