



Unity Presbyterian Church  
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## TESTIMONIAL 3

June 21, 2017

Since moving to Indian Land, SC and the Fort Mill area in 2014, we have been blessed as new members of Unity Presbyterian Church. We feel strongly that by contributing a portion of our personal finances to the Annual Unity Stewardship and the Unity Endowment Program, Unity ministries will grow now and in the future. We hope our gifts will serve Unity members and missions in a manner that is pleasing to God-the true head of the church.

Therefore, we have fulfilled pledges for annual stewardship needs and made significant commitments to the Endowment Program to help perpetuate funding for generations to come. Based on our beliefs and John's 40 year experience as a Financial Planner, we have made gifts using four(4) tax advantaged methods: 1) Direct cash contributions for imminent cash distributions ; 2) Tax Free transfer of Required Minimum Distributions (RMD) after age 70 & 1/2 ; 3) Amended an IRA Beneficiary form to include a specified dollar amount(\$) to the Unity Endowment ; and 4) Directed a tax free donation to Unity from a Rogers Family Donor Advised Fund. All these arrangements were accomplished without the need or services of an attorney or tax advisor.

We earnestly encourage Unity members to evaluate current and future estate planning opportunities to benefit personal and congregational ministries .

John & Carolyn

**“Creating A Legacy Today, For A Faithful Tomorrow”**