

# *Create a Legacy*



*The St. Paul's  
Legacy Society*

*Stewardship is what we do,  
all of the time,  
with everything God has given us.*





Through the vision and generosity of generations of parishioners, St. Paul's Episcopal Church has been an important landmark and spiritual home for over 175 years. The preservation of our buildings, our offerings of worship and music, the Christian foundations of our children, the caring ministries to those both within our community and beyond, all depend on the legacy of enduring support.

The St. Paul's Legacy Society was created to honor those who have chosen to support the life and work of the church through charitable bequests, beneficiary designation, and other planned giving arrangements.

We invite you to join this tradition of thoughtful and faithful stewardship by making St. Paul's part of your legacy.





Planned giving describes the thoughtful designation of gifts made from accumulated resources. It is a means by which anyone concerned with the wise use of his or her personal resources makes a considered choice about their ultimate disposition.

Unlike contributions made through our annual stewardship campaign, planned gifts grow the church's enduring resources. These resources can be used to greatly enrich areas of ministry such as outreach or music, or to ensure our future ability to maintain our vital and historic physical property.

The St. Paul's Legacy Society recognizes those who have chosen to make St. Paul's part of their legacy. When you include the church in your will, whether your gift is \$1,000 or \$500,000, it will become part of your legacy. Your gift will help to ensure that St. Paul's continues to welcome and serve all in the name of Christ for many years to come.



# Planned Giving

Depending on your income needs, tax situation, and other estate plans, there are various options for making a planned gift.

## *Bequest*

The easiest way to make a lasting difference is to remember St. Paul's in your will or estate plan. These gifts to the endowment can be used to perpetually sustain all of our vital ministries. You may bequeath a specific amount, a percentage of your estate, or specify a gift of securities, real estate or tangible personal property. If you have an existing will, we encourage you to work with your lawyer to include a simple, inexpensive supplement or "codicil".

## *Retirement Fund Assets*

Retirement plan assets are considered an attractive option for making a planned gift. To make a charitable gift of retirement assets, simply complete a new beneficiary designation form naming St. Paul's as a percentage beneficiary.

# Opportunities

## *Life Insurance*

You may use one or more whole life insurance policies to make a future gift to St. Paul's. To do so, name St. Paul's as a percentage beneficiary of a new or existing policy, or simply transfer ownership. As with retirement plan assets, using a life insurance policy to make a charitable gift can be as quick and easy as completing a new beneficiary designation form.

## *Life Income Gifts*

Life Income Gifts provide you or your designated beneficiary with income for life in exchange for your gift. A tax benefit is created at the time the gift is established. The three most common types of life income gifts are Charitable Remainder Trusts, Charitable Gift Annuities, and Pooled Income Funds. These types of gifts generally reduce or eliminate certain taxes while providing annual income.

Please consult your tax or financial advisor for benefits specific to your situation.

## *Endow Your Pledge*

Some parishioners are leaving funds to sustain their contributions to the church's annual budget. To fund an annual \$1,000 pledge in perpetuity, for example, would require an estate gift of \$25,000 (under current endowment draw of 4%). Funding all or part of your pledge is a wonderful way to ensure St. Paul's future.



For more information about Planned Giving opportunities and the St. Paul's Legacy Society, please contact Pam O'Halloran at [pohalloran@stpauls-church.org](mailto:pohalloran@stpauls-church.org) or (216) 932-5815.



## St. Paul's Legacy Society

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