

'Planned Giving' means using estate and tax planning techniques to provide for the Church and other heirs in ways that maximize giving and minimize the impact on the donor's estate. Some planned gifts provide a life-long income to the donor. Thus, by definition, a planned gift can include gifts made in lifetime or at death as part of a donor's overall financial and/or estate plan.

You know who and what you want to protect. Here are some of the ways you can do it.

Bequests

By far the easiest and most popular way to include the church in one's estate plan is a bequest through a will or living trust. This enables you to retain control of assets throughout your lifetime, while providing a future gift to the church.

Retirement Plan Assets

The church can be designated as a beneficiary of an IRA, 401(K), 403(b), deferred annuity, or similar retirement plan. Any of these plans allow multiple beneficiaries so that you can leave a percentage of the funds to your church while also providing for your heirs.

Life Insurance

You can purchase a new policy, donate an old policy, or simply name your church as a beneficiary of an existing policy.

Charitable Remainder Trust and Charitable Gift Annuity

These gifts enable you to set aside assets for the church, receive a current income tax deduction, and arrange life income for yourself or a loved one. Such gifts can be especially advantageous when funded with highly appreciated property. Or, you can arrange for a retirement plan's assets to fund a charitable trust to pay income to your heirs with the principal going to the church.

Gift of House, Vineyard or Farm

You can arrange to give your house, farm, or vineyard to the church; continue to use it for the rest of your life; and receive a significant current income tax deduction.

Charitable Lead Trusts

These trusts pay an income to the church for a specific period of time; then, they distribute the assets to heirs. They can provide significant estate tax savings and arrange for young heirs to receive their inheritance when they are more mature.



You should consult with your financial advisor to determine the relative tax advantages for any of these choices.

We live through the grace of God, and all that we have comes from God. Still, at the end of our lives we all die. While some of us die with great assets and some of us with a modest estate, almost all of us would like our resources to benefit our families. **But who is our family?**

In our church we marry, baptize and bury those we love. We work side-by-side, laugh together, cry together and celebrate together as **family**. What incredible joy we feel by providing gifts to assure that future members of this family can find their faith home in The Episcopal Church.

The Book of Common Prayer urges parents to make “prudent provision for the well-being of their families,” and it urges all persons to “make wills, while they are in health . . . not neglecting, if they are able, to leave bequests for religious and charitable uses.”

[BCP, Page 445]

It can be easy to include the church in your plans and your Episcopal Foundation can help. We are family too!



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Planned Giving Is Taking Care of Family

Your Church Name Here



From Gratitude
to Action

