

1841 Legacy Society Enrollment Form

Check all that apply.

- ☐ I have not yet included St. John's in my planned giving, but I intend to do so.
- ☐ I would like to discuss planned giving with the clergy or a member of the Planned Giving Committee.
- ☐ I have already included the church in my planned giving, and completed all necessary legal and financial documentation to ensure that my wishes are carried out.
- ☐ Please include my name as a member of the 1841 Legacy Society.
- ☐ I would prefer to remain anonymous.

Today's date: _____

Name: _____

Address: _____

Phone: _____

Email: _____

Thank you!

NEXT STEPS

- Prepare or update your will.
- Contact your tax advisor, financial planner, or estate attorney to discuss how to include St. John's in your planned giving.
- Become a member of the 1841 Legacy Society at St. John's by completing the form on the back of this brochure to let us know that you have included St. John's in your estate planning, or intend to do so.
- Spread the word. Let your family and legal and financial advisors know that you have taken responsibility for your legacy by including St. John's (and other charitable organizations if you wish) in your estate planning, giving copies of legal documents to them as appropriate.



St. John's Episcopal Church
679 Farmington Avenue
West Hartford CT 06119
860.523.5201
sjparish.net/planned-giving

*Help ensure a
healthy future for
St. John's Church
through planned
giving.*



FREQUENTLY ASKED QUESTIONS

What is planned giving?

Planned giving involves supporting religious and charitable organizations that are meaningful to you by including them in your estate and financial plans. It is a ministry and a powerful expression of Christian stewardship. The Book of Common Prayer invites parish clergy to "instruct the people...about the duty...of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses." (p. 445).

How does planned giving benefit the church?

The funds that St. John's receives via planned giving, through bequests, trusts, or other financial instruments, support the church's mission and ministry and provide a source of income outside of pledges and gifts. Planned gifts directed to the endowment help it to grow and continue supporting the work of the church into the future. St. John's is thriving today in part because of past members who included the church in their financial and estate plans.

How does planned giving benefit me?

Planned giving allows you to ensure a healthy future for St. John's without affecting your cash flow or assets during your lifetime. Leaving assets to the church may result in estate tax savings for your loved ones after your death. You also retain the flexibility to modify your planned gifts should your circumstances change.

How do I give to St. John's through planned giving?

There are three types of planned gifts:

- a bequest in a will;
- a life income gift, such as a pooled income fund, charitable gift annuity, or charitable remainder trust; or
- gifts of special assets, such as stock, life insurance, or retirement funds.

Planned gifts may be unrestricted or designated for a specific purpose, such as the endowment. Parish leaders are available to answer questions and discuss options for designated gifts. Church representatives, however, cannot provide legal or financial advice, so please consult an attorney, financial planner, and/or tax professional for guidance. Include the church's full name, address, and federal tax ID number in documents that name St. John's as a beneficiary:

St John's Episcopal Church
679 Farmington Avenue
West Hartford, CT 06119

Federal Employee ID Number: 06-0653123

What is the 1841 Legacy Society and how do I join it?

The 1841 Legacy Society is a group of parishioners who have informed the church that they have included St. John's in their estate planning. To join the society, please fill out the form on the back of this brochure and return it to the church. Legacy Society members are recognized in the annual report and on other occasions as appropriate.

“ The faith community of St. John's has meaningfully enriched our lives for more than 30 years.

It has been a place of growth, relationship, challenge, comfort, and inspiration. The friendships we have developed here are deeper and more abiding than many of those forged in other places because they are grounded in a common spirituality. Now more than ever, the world needs a beacon of light and hope like St. John's.

That is why we give joyfully each and every year through the annual pledge campaign. But we also recognize a responsibility to make sure that St. John's will continue to be that beacon, that spiritual home, that pillar of the community, long after we move on.

That is why we have made a formal commitment, through a legacy gift in our estate plans, to share a portion of what we have so that others might be blessed as we have been. ”

- Kim & Chris Byrd, St. John's members

