



ST. JOHN'S NORWOOD
Bethesda-Chevy Chase

LEGACY GIVING PROGRAM

ST. JOHN'S EPISCOPAL CHURCH | NORWOOD PARISH

St. John's has established a Legacy Giving Program to enable it to build an even stronger faith-based community at St. John's so that we can continue to be a beacon of God's light and love for generations to come. We hope that you will join us in this holy endeavor by prayerfully considering a legacy gift to your home church.

What is a 'Legacy Plan'?

A Legacy Plan allows you to make a gift that will make a lasting difference in the life and ministry of St. John's when you no longer can do so. It is a way to support the Church in a manner that is outside of pledge income. In short, it is your personal legacy to the future of our Church. Legacy Gifts typically fall into two categories:

- Some planned gifts provide lifetime income and possibly tax benefits to the donor through an annuity or a charitable trust while providing a share of the income and/or principal to St. John's
- Other gifts are 'testamentary gifts' that are made at end of life through a bequest from a will or as a beneficiary designation on a life insurance policy or retirement account.

Why did St. John's establish a Legacy Giving Program?

The objectives are twofold:

- To encourage and assist parishioners to develop a plan that will achieve their personal and philanthropic goals.
- To bolster St. John's current and future financial health so that we can do more to live into our core values of providing dynamic and relevant worship, fostering personal and spiritual growth and maturity, building authentic and meaningful community, and making a difference in the lives of people both within our church family, as well as in the wider community, the nation, and the world.

We realize that estate planning can be a challenging topic. Statistics indicate that the percentage of Americans with a will and estate plan has steadily declined over the last decade. Experts say that there are several reasons. First, some people simply find it hard to contemplate their own mortality. Others fear that family conflicts will arise in the planning process. Still others defer this task because they believe the time and cost will be burdensome.

Through this Program, St. John's can provide information and support that may make it easier to prepare an estate plan. Also, as with other pastoral matters, your St. John's clergy can provide a safe place to talk confidentially about the difficult questions that sometimes arise.

If, in your planning process, you choose to make St. John's a recipient of your gifts, it will be used to support one or more of its core missions. You can also choose to direct your gift to a particular ministry of the Church. Over time, Planned Gifts will be an important source of funds to supplement annual income from other sources, such as pledges.

How will Parishioners who make a Planned Gift be recognized?

Parishioners who commit to making a legacy gift will automatically become members of the Norwood Guild. The Guild honors those who make any type of legacy gift to St. John's. Unless the donor requests anonymity, we will periodically list the names of all Norwood Guild members in Church publications. We also plan to have other activities to celebrate and support participants in the Program.

We also have formed a separate category of recognition, the Norwood Saints. This publicly recognizes those parishioners from whom we have received a legacy gift after they have passed away.

What can you do?

If you already have a will or beneficiary designation that includes St. John's, please let us know so that we can personally thank you and include you in the Norwood Guild. If you would like to include St. John's in your estate plan, you can do so either by making a gift of a specific amount or designating a percentage of your estate in your will. There are also ways to make a lifetime gift to St. John's, that may offer current tax benefits.

If you wish to speak to someone about a Planned Gift, please contact Earle O'Donnell at earle1odonnell@gmail.com or by phone, 202-329-2541. I would be delighted to speak to you about your plans or answer any questions.

Please know that your gift, in any amount, will be honored and appreciated.

Thank You,
Earle O'Donnell
Legacy Giving Advisor

NORWOOD GUILD ACKNOWLEDGEMENT FORM

On behalf of the Vestry and Clergy of St. John's, we want to thank you for your legacy gift to St. John's. Your gift will provide a long-term source of funds that will enable St. John's to accomplish its mission for many years to come. We would like to include you as a member of the **Norwood Guild**. The Norwood Guild was formed by the Vestry for the sole purpose of honoring persons who have included St. John's in their will or made a lifetime gift to St. John's. We plan to recognize members of the Guild by periodically listing the names of Guild members in our church publications and through other activities.

To help us keep track of Guild membership, would you please be kind enough to provide the brief information below? We hope that you will allow us to include your name in the list of Guild members because we want to honor you and because we believe that membership in the Guild is an act of leadership within our Church community that may encourage others to make a planned gift. However, we also know that some people do not want their names to be known when making a gift. If you wish to remain anonymous in our public list of Norwood Guild members, please check the box below.

Thank you.

If you wish to remain anonymous, please check this box.

Please print:

Name: _____

Address: _____

Email: _____ Phone: _____

Please check the relevant box(es) below to indicate what type of gift you are making:

Will

(Please provide contact person such as your attorney or executor/executrix)

Life Insurance Policy

(Please provide name of insurance company and policy number)

Retirement Plan Beneficiary

(Please provide name of financial firm & account number)

Other

GETTING YOUR AFFAIRS IN ORDER

Death is one of life's certainties. When we die it falls to members of our family, friends, distant relatives, or to total strangers to plan our burials.

Planning such things when you are grieving is both hard and time-consuming. Often members of the surviving family live far apart and have never discussed these matters; when the time for planning comes they can have very different ideas about what the deceased person would have preferred or about what would be appropriate.

The best way to minimize conflict on these issues is to make your own plans. It is a very thoughtful gift both to your family and to yourself. In essence, you leave a form saying, "This is what I prefer."

Before planning the service, with its many options, it will be helpful to your family if you provide certain preliminary information:

1. Do you wish to be buried in a casket? _____
2. Do you prefer to be cremated? _____
3. Where do you wish to be buried? _____
4. Who should be notified of your death? _____

(In addition to family and friends, list Social Security, pension funds, especially military pension funds, insurance companies, organizations, school and colleges, professional associations, and other associations known only to you.)

5. Are you entitled to military honors? _____
6. Are you eligible for burial in Arlington or any other national cemetery? _____
7. If so, where are your discharge papers? _____
8. If you own a burial site, where is the deed? _____
9. Whom do you wish to conduct the funeral? _____
10. Who should be invited to speak about you? _____
11. Is there anyone who should not be invited to participate or to attend? _____
12. Have you made a will or created a revocable trust? _____
13. Does your will make prudent provisions for the well-being of family, with clear directions about the guardianship of any minor children, and the arrangements for their nurture and education? _____

14. Does your will or trust leave bequests for charitable purposes, and particularly for the church? _____

15. Where are your will and other important papers? _____
16. Where is your lock-box and where is the key? _____
17. Where is your passport? _____
18. Do you have valuable papers that need to be kept? _____
 Where are they? _____
 What are they? _____
19. Where are bank books, stock certificates, titles and deeds of ownership? _____

20. Have you compiled a list of valuable things and their proposed recipients apart from your will? _____ Where is the list? _____
21. Whom have you designated as your executor?² _____
22. Does anyone have any outstanding obligations to you about which your family or executor³ should be aware? _____
23. Who has power of attorney? _____
24. Who has your healthcare power of attorney? _____
25. Do you have a living will or other written instruction regarding end of life issues? _____
 Where is it? _____
 Who has copies? _____
26. Do you own property of which others may not be aware? _____ Where is it? _____
27. Do you have partnerships in properties or business of which others may not aware? _____
 Where are the corporate offices? _____
28. Do you have death benefits of which others may not be aware? _____
29. Who is your funeral director? _____

Signed: _____ *Date:* _____

Document courtesy of The Reverend Phillip C. Cato, Ph.D. phillipcato@yahoo.com ³ (with slight editorial and grammatical changes)

¹ Or Executrix

² Or Executrix

³ Note: Much personal data these days is contained on computers and cell phones. If this is true of you, we suggest you make sure that heirs can find your password or other information needed to access information you believe that they will need.