

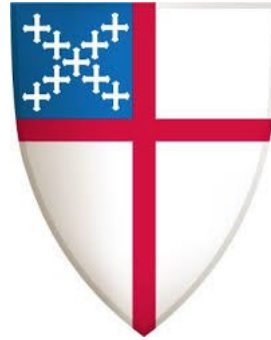
WHO CAN ADVISE ME ON MY BEST OPTIONS?

- We urge you to consult with your attorney, financial advisor, and/or tax advisor and have them review and approve the information we have provided to you. The information in this brochure in no way constitutes legal or financial advice.
- If you would like to discuss including St. John's in your estate plan, please email the church at plannedgiving@stjohnsec.org. We would be pleased to meet with you.
- For more information on making a planned gift to St. John's, please visit the planned giving page on our website: www.stjohnsec.org/planned-giving.

HOW WILL MY GIFT BE RECOGNIZED?

St. John's has established the Dorsey Society to recognize and honor people who have included St. John's in their estate plans. Anyone who shares his or her intentions for a planned gift to the church becomes a member of the Dorsey Society. Membership in the Dorsey Society bears witness to the value of St. John's in your life and encourages others to consider including St. John's in their estate plans.

If you agree, you will be recognized by name in the church's annual report and other documents as a member of the Dorsey Society. If you prefer that your name not be disclosed to the congregation, your planned gift will be included in the annual report as from an anonymous donor.



*“All shall give as they
are able, according to the
blessing of the Lord your God
that he has given to you.”
Deuteronomy 16:17*



**Making a
Planned Gift
to St. John's**



9120 Frederick Road • Ellicott City, MD 21042
plannedgiving@stjohnsec.org
www.stjohnsec.org/planned-giving
410-461-7793

WHAT IS A PLANNED GIFT?

We know that God's work and the needs of the fellowship of St. John's Episcopal Church will transcend our lifetime. A simple way to ensure that your treasure will continue to support St. John's and its work in the community long after you are gone is through a planned gift.

A planned gift is a form of charitable giving through your estate plan, such as a bequest in a will, a distribution from a retirement plan or an insurance policy, or a charitable gift annuity. For many of us, remembering St. John's in our estate plan is one of the best opportunities to make a major gift.

Your planned gift to St. John's is an expression of faith: giving back to God a portion of what you have been blessed with in life and ensuring that the church you love can continue in vibrant worship, fellowship, and outreach for generations to come. With a planned gift, you leave a legacy of caring and an enduring offering for future generations.



WHAT ARE THE ADVANTAGES?

For you and your family, a planned gift:

- Is an opportunity to express the values you hold dear and can be an extension of your faith and practice;
- Is a form of stewardship that will last well into the future;
- May provide tax advantages for you and your heirs; and
- Need not diminish your current income or assets.

For St. John's, a planned gift:

- Is a commitment to the church's future; and
- Will serve as an enduring source of support for the mission and ministries of the church.

WHAT TYPES OF PLANNED GIFTS MAY BE CONSIDERED?

- **Bequest:** This is a gift made through a will or trust. The gift can be a fixed dollar amount, a specific asset, a percentage of your estate, or the assets remaining after specific bequests to your heirs or charities have been fulfilled.
- **Retirement plan and life insurance:** Add St. John's as a beneficiary.
- **Publicly traded securities:** Gifts of stocks, bonds, and mutual funds.

HOW WILL MY GIFT BE USED & MANAGED?

If your gift is unrestricted, it will be utilized according to the needs of St. John's at the time the gift is received, as determined by the Vestry.

St. John's maintains three funds to which a bequest or other planned gift may be directed. These funds are managed for long term growth, as detailed in St. John's investment policy. These funds include the following:

- **The Perpetual Endowment Fund** – income is used to fund general operations;
- **The George Kingsley Endowed Scholarship Fund** – income is used to fund tuition and other assistance to promote diversity among the students at the St. John's Parish Day School; and
- **The Matthew 25 Fund** – used to fund new outreach projects.

If you would like your planned gift to be directed to a particular fund or used for a certain purpose, you may give written instructions to St. John's in your will, your trust document, or in a letter to the church's business office.

Before making a decision about a planned gift, particularly a gift of real or personal property, we strongly encourage you to review the St. John's Gift Acceptance Policy at www.stjohnsec.org/planned-giving.