

HOW TO CREATE AND GROW A LEGACY SOCIETY

The Rev. Charles Cloughen, Jr.

Planned Giving Officer
Diocese of Maryland

Diocesan office: 410-467-1399 ext. 381
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CREATION OF A LEGACY SOCIETY

1. Secure a commitment from the Rector or Vicar to read aloud the instruction on page 445 of the Book of Common Prayer following the Thanksgiving of a Child at least 3 times per year and comment on it.

"The minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all person 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."

It is found in the Thanksgiving for a Child because having a will is responsible parenthood.

2. Add to the donation card, if it is not already there, a check-off [see Appendix A]:

 ___ I have remembered ___ in my will or estate plans

 ___ Please send me information about including _____ in my will or estate plans
3. Have the treasurer or keeper of the gifts compile a list of those who have remembered _____ in their wills or estate plans.
4. Have in place an endowment fund brochure.
5. The Vestry is presented with or develops a Legacy Society and approves a plan of action. [See Appendix B]
6. Review those who have remembered the church in their will, and form a small committee with Chair and Co-chair from those who have remembered the church in their will and invite them, by a letter to all who have checked off the donation card, to be founding members of the Legacy Society [see Appendix C]. Also include a form to be filled out that includes a check-off giving permission to publish their names [see Appendix D].
7. List those names in the Annual Report and share that through the parish newsletter and invite new members [see Appendix E].
8. Prepare a plaque with screwed in names of the members of the Legacy Society and put it in a prominent place. (One idea is a tree with the names on the leaves.)
9. Every year at the Annual Meeting share the names of the Legacy Society members and have a special event thanking them. (The Diocese of Maryland has

a Legacy Society recognition event at Clover Hill or the Bishop Claggett Center. Our committee called all the members and offered to have a carpool for them.)

10. Publicize when the church receives a bequest from members of the Legacy Society.
11. Speak about it, when appropriate.
12. Repeat the program year after year. At St Thomas', I normally invited 2-4 people per year to join based on the check-off on the donation card.

St. Thomas' Church
Homestead

Towson, Maryland

*In Thanksgiving For All The Gifts
God Has Given To Me And My Family,
This Pledge Is Made For The Future Growth Of*

St. Thomas' Church Pledge

Weekly	Monthly	Annually
\$ _____	\$ _____	\$ _____

Name _____

Address _____

_____ I have remembered St. Thomas in my will

_____ Please send me information concerning wills

Any questions regarding the Outreach and Heritage Funds will be gladly answered by the Rector and by members of the Vestry. The By-laws of both the Outreach and Heritage Funds are on file in the Parish Office.

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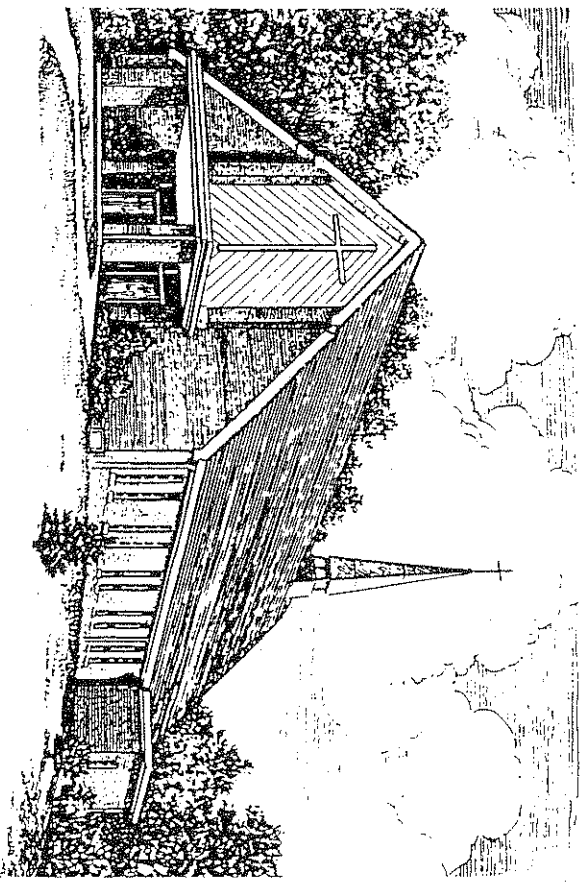
FORM OF BEQUEST

THE OUTREACH FUND

I give, devise and bequeath to St. Thomas' Church -
Homestead, 1108 Providence Road, Towson, Maryland,
the sum of _____ or _____ %
of the residue of my estate or property, for the St. Thomas'
Church Outreach Fund.

THE HERITAGE FUND

I give, devise and bequeath to St. Thomas' Church -
Homestead, 1108 Providence Road, Towson, Maryland,
the sum of _____ or _____ %
of the residue of my estate or property, for the St. Thomas'
Church Heritage Fund.



**St. Thomas' Church
Homestead**

Outreach and Heritage Funds

1108 Providence Road
Towson, Maryland 21286

ST. THOMAS' CHURCH

OUTREACH AND HERITAGE FUNDS

The purpose of these Funds is two-fold:

1. The Outreach Fund - Income from this Fund is to be used for the relief and assistance of members of St. Thomas' Church or to be distributed as charitable grants to charitable organizations to further God's work in the community.
2. The Heritage Fund - The purpose of this Fund is to provide a source of income to be used to preserve, renew, replace and develop the heritage of properties of the church so that the church continues to be a fitting place of worship and to fulfill its mission.

Gifts may be made as memorials. The names of those in whose memory gifts are made will be inscribed in the Book of Remembrance and their families will be notified of the gift. Formal acknowledgements will be sent to families and donors.

Memorials may be substantial or they may be small; for example, a donation could be sent to the fund instead of flowers to a funeral.

Gifts may be made in thanksgiving, for anniversaries, and in remembrance.

Gifts may be in the form of cash, stocks or bonds, if equities which have appreciated in value are given, the donor may not be required to pay a capital gains tax, and may use the current market value of the stock as an income tax deduction.

Gifts may also be articles of value, such as silver or paintings, or a house, or land; in short, almost anything a donor wishes to give. These gifts are tax deductible to the limit allowed by law. It should be understood, however, that it is within the discretion of the Vestry to sell all gifts and deposit the proceeds in the designated Fund.

The Parish will also welcome bequests. Indeed it is hoped that many parishioners will provide (in their wills) for contributions of these Funds.

There are many ways to make bequests. For instance, a person could give a large sum to the Fund, receive the income therefrom during his/her life, and at death the estate would pay no inheritance tax on the bequest to the Church.

A standard form of bequest will be found on the back page of this leaflet. If interested, parishioners are advised to discuss this matter with their attorney, who can suggest to them the most advantageous way to make a bequest to St. Thomas'.

These Outreach and Heritage Funds correspond to the endowment funds which many churches are developing.

If anyone wishes to establish a trust fund for a designated purpose, please consult the Rector.

ST. THOMAS' ALL SAINTS LEGACY SOCIETY

January 6, 2007

Dear Nancy,

We are writing to ask you to join with us in becoming founding member of the St. Thomas' All Saints Legacy Society. This Society has been created to commend and graciously thank those who have remembered St. Thomas' in their Last Will and Testament.

You indicated on your Pledge Card that you have remembered St. Thomas' in your will. Your witness to your stewardship will provide for the future life and ministry of St. Thomas'. Your witness will encourage others to leave a legacy. We want to recognize your commitment and invite others to join with us in remembering St. Thomas' in their Estate plans.

We have named this the "St. Thomas' All Saints Legacy Society" in honor of all those who make up the Communion of Saints. In New Testament times "saints" were referred to all the members of the Christian Church who most clearly witnessed to Christ. These "friends of God" were heroic examples to all the saints of the meaning of the Christian faith, hope and love. With these noble examples in mind, those members of the All Saints Legacy Society offer their gifts to build up our church so that future generations might know and "share the Body of Christ".

We plan to write to our entire Parish and invite them to join us as a Member of the All Saints Legacy Society and share with them the names to those who have joined.

Please fill in the enclosed form and return it by January 22nd, so that your name may be listed in the invitation to the entire Parish.

Again, we thank you for including St. Thomas' in your estate plans.

Peace, Love and Joy,

Charles Cloughen

Marie Rector, Chair

Robert Carter, Co -Chair

William Dickinson, Co-Chair

St. Thomas' All Saints Legacy society

Enrollment Form

The St. Thomas' All Saints Legacy Society honors individuals who make an investment in our future ministry by including St. Thomas' in their estate plans or through lifetime gifts.

I (we) accept the invitation to join fellow supporters of St. Thomas' in becoming (a) member(s) of the St. Thomas' All Saints Legacy Society.

Name(s): _____

Address: _____

Phone: _____

Email: _____

On the roll of the All Saints Legacy Society I (we) wish my (our) name(s) to appear as:

Signed: _____

Date: _____

I (We) consent for my (our) name(s) to appear with others on the public roster of the Society.

I (We) don't wish for my (our) name(s) to appear with others on the public roster of the Society.

+++++++
Confidential

___ I (We) have included St. Thomas in my (our) estate plan.

Please return this form to St. Thomas' Episcopal Church, 1108 Providence Road, Towson, MD 21286 in an envelope marked "Confidential" by May 21st, 2007.

Thank you very much. Your gift will be a blessing to many.

SAINT THOMAS' ALL SAINTS LEGACY SOCIETY – JUNE 14, 2007

ANONYMOUS

MR. AND MRS*. ROBERT CARTER

THE REV. CHARLES AND JUDITH CLOUGHEN, JR.

MR. AND MRS WILLIAM DICKINSON

MR. AND MRS. CHARLES FLAYHART

MRS. LINDA FORMWALT

MR*. AND MRS. VERNON GALLAWAY

MR. AND MRS. KEVIN HARPER

MR. AND MRS.* JOHN HENZLER

MR. AND MRS. BRAD HOWATT

MRS. FRANCES JACOB

MRS. ADA JOHNSON

MR* AND MRS. WILLIAM JONES

MR. AND MRS. JAMES KAPPLER

MR. AND MRS. DANIEL W. LICHT, SR.

MRS. MILDRED S. MOORE

REV. WILLIAM OLSEN

MS.E. MARIE RECTOR

MR. V. CHARLES RINAUDO

MR. AND MRS. FRANK H. ROBINSON

MR. AND MRS. STEPHAN SAPPE

MRS. ANN JUNE SCHUMAN

MR. AND MRS. JASON STAHL

MR. AND MRS.* JOHN STUBS, JR.

MISS ANNA RAY SUTER

MRS. ELLEN TOTARO

MR.* AND MRS. WILLIAM WAXTER

MR. AND MRS.* THOMAS WHALEN

MISS NANCY E. WOODRING

* DENOTES DECEASED

29 MEMBER HOUSEHOLDS

We gratefully acknowledge your contribution to

Heritage Fund of St. Thomas' Church

given in memory of

Charles Cloughan, Jr.
Rector

We gratefully acknowledge that a gift has been given to the

Heritage Fund of St. Thomas' Church

by _____

to the Glory of God and in loving memory of

Charles Cloughan
Rector