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
Home office: 410-321-4545
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*

<table>
<thead>
<tr>
<th>St. Thomas' Church Pledge</th>
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<tbody>
<tr>
<td>Weekly</td>
</tr>
<tr>
<td>$______</td>
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Name________________________________________

Address_____________________________________

_______ I have remembered St. Thomas in my will
_______ Please send me information concerning wills
Outreach and Heritage Funds

St. Thomas Church

Townson, Maryland 21286

1108 Providence Road

Homestead Church

Church Heritage Fund:

of the residue of my estate or property, for the St. Thomas

% or 

Homesteaded, 1108 Providence Road, Townson, Maryland,

I give, devise and bequeath to St. Thomas Church -

THE HERITAGE FUND

Church Outreach Fund:

of the residue of my estate or property, for the St. Thomas

% or 

Homesteaded, 1108 Providence Road, Townson, Maryland,

I give, devise and bequeath to St. Thomas Church -

THE OUTREACH FUND

FORM OF BEQUEST

**********

Funds are on file in the Parish Office.
the By-laws of both the Outreach and Heritage
will be easily answered by the Rector and by members of
Any questions regarding the Outreach and Heritage Funds
If anyone wishes to establish a trust fund for a designated Outreach and Heritage Funds correspond to the Church, these Funds are named "The Heritage of St. Thomas Church." Funds may be made in the form of cash, stocks, or bonds. If cash, the donor may be given a letter of thanks. If stocks, the shares may be given, and any appreciation may be recorded in the donor's records. If bonds, the donor may be given a similar letter of thanks. A standard form of bequest will be found on the back page.

The Parish will also welcome bequests. In their wills (or for contracts), many parishioners will provide (in their wills) for contributions. A bequest may be both a bequest to the Church and a bequest to the donor.

If the donor desires to make a bequest to the Church, they may be made in the form of cash, stocks, or bonds. If cash, the donor may be given a letter of thanks. If stocks, the shares may be given, and any appreciation may be recorded in the donor's records. If bonds, the donor may be given a similar letter of thanks.

The purpose of these Funds is two-fold:

1. The Outreach Fund - Income from this Fund is

2. The Heritage Fund - The purpose of this Fund is

The Heritage Fund is to provide a source of income to be used to promote the Church’s mission. Income to be used for the church and to further the Church’s work in the community. To build and develop the Church and to enhance the Church’s mission. To provide a source of income to be used to promote the Church’s mission. Income to be used for the church and to further the Church’s work in the community.
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 22\textsuperscript{nd}, 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
Robert Carter, Co-Chair

Marie Rector, 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

ANONYMOUNOS
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 Coughlan
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 Coughlan
Rector