

***[Name of***

***Legacy Program]***

***[Church Name]***

***[Street Address]***

***[City, State, Zip Code]***

***[Phone]***

***[Website Address]***

***[Name of***

***Legacy Program]***

***[Insert your logos and pictures or choose from***

***six generic logos and stock pictures***

***designed by the Foundation]***

*“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 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.”*

Book of Common Prayer, P445

A statement that my

parish should

continue into the future.

An expression of

what has

meaning in my life.

My bridge to the

next generation.

WHAT IS

LEGACY GIVING?



**[Website Address]**

Integer egestas orci quis lorem feugiat adipiscing.

Lorem  
Ipsum Dolor

A LEGACY GIFT IS OFTEN THE LARGEST GIFT A PERSON CAN MAKE…

So it is important to take time to make a prayerful and thoughtful consideration of the legacy you would like to leave. Individuals of all income levels make planned gifts to accomplish their charitable purposes. This type of gift speaks to intention and generosity more than net worth.

1. **Making a Bequest in your Will or Trust**: You may choose to donate a percentage or a specific dollar amount.
2. **Naming the Church as a Beneficiary Of A Life Insurance Policy**
3. **Naming the Church as a Beneficiary of a Retirement Account (IRA, 401k or 403b)**
4. **Charitable Gift Annuity or Charitable Remainder Trust:** These types of gifts offer the donor guaranteed lifetime fixed income payments and may offer significant tax savings.
5. **Charitable Lead Trust:** Offers significant estate tax benefits.
6. **Cash Gifts:** These types of gifts provide a tax deduction and are easy to make if you have liquid assets that are not needed now.
7. **Appreciated Stock, Securities, Real-Estate & Tangible Personal Property Gifts:** These types of gifts may offer significant tax benefits.

END OF LIFE PLANNING CHECKLIST

Below is a quick checklist to assess where you are in your end-of-life stewardship planning.

* Do I have an updated will or trust?
* Have I chosen a medical power of attorney?
* Have I chosen a general power of attorney?
* Have I nominated guardianship for my children?
* Do I have a living will?
* Do I have long term care insurance?
* Do I have disability insurance?
* Have I remembered my church and other charitable institutions in my will?

**To make a legacy gift, contact your lawyer or financial consultant.**

**For more information, contact Scott Asper, Colorado Episcopal Foundation**

**scott@coef.org or 303.534.6778**

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This journey starts by reflecting on the abundance God has bestowed upon you during your lifetime. While in the presence of God, ask the Holy Spirit to reveal to you the people and institutions that helped you find your purpose and gave meaning to your life. Ask yourself:

* *Which institutions do I want to see prosper in order to serve and uplift the next generation?*
* *What areas of ministry have especially blessed me and my family?*

Next, ask for the Holy Spirit’s guidance in creating a financial plan that honors these institutions and ministries. Your legacy gift will make a difference in the future of a ministry that you have cherished and supported during your lifetime.

**SIMPLE WAYS TO MAKE YOUR LEGACY GIFT**