



How Can I Make a Legacy Gift?

The choice of an appropriate planned gift usually provides significant tax advantages to the donor. Some of the most common are:

Make a Bequest in Your Will.

The most common way of making a planned gift in our Diocese is by a bequest in your will. You can designate specific amounts, a percentage of your estate, or a specific asset, and you can name one or more beneficiaries.

Make the Church a Beneficiary of Life Insurance.

If you own a policy that is “paid up” or no longer needed for liquidity in your estate, you might consider making your church the beneficiary. Or purchase a new policy with the church both the owner and beneficiary with the premiums paid to you.

Make the Church a Beneficiary of Retirement Plans.

Designating your church as the beneficiary of deferred income tax retirement accounts, such as an IRA or 401(k), is an attractive way to make a significant gift to the church, often with considerable income and estate tax savings for the donor.

Make a Planned Gift that Provides Income.

Charitable gifts such as Charitable Gift Annuities or Pooled Income Funds provide income to the donor for life and afterwards provide a major gift to the Church. (These gifts are administered through the Episcopal Church Foundation. www.episcopal.foundation.org)



The Bishops’ Legacy Fellowship

In appreciation for making a planned gift, you’ll automatically become a member of the Bishops’ Legacy Fellowship. This is one of the ways the ministry of legacy stewardship is spread to other church members. The Bishops’ Legacy Fellowship does not raise funds, but encourages, supports, and celebrates gifts made as part of an estate plan for the benefit of a parish church, the Diocese of Western Massachusetts, or Episcopal institutions such as the Episcopal Relief and Development program.

Next Steps

- Speak with your priest about your interest in making a Legacy Gift.
- Consult with an attorney or financial planner.
- Contact the Episcopal Church Foundation at 800-697-2858 or visit its Web site: www.episcopal.foundation.org.

For further assistance or information, fill out the enclosed response card and mail it to the address indicated. Or contact:

E. John White
Missioner for Legacy Stewardship
860-928-3705
ejwhite@diocesewma.org
Also, visit <http://www.diocesewma.org>
Our Mission & Ministry>Legacy Stewardship



“People have made at least a start at understanding the meaning of life when they plant a shade tree under which they know full well they will never sit.”

- D. Elton Trueblood

LEGACY STEWARDSHIP

Supporting your congregation

Providing for family members

Enriching your spiritual life

Bishops’ Legacy Fellowship

The Episcopal Diocese of
Western Massachusetts



History and Traditions Are Important.

Maybe your church is rich with history and tradition; or is only a few years old and seeks to establish its legacy. Similarly, your family may have been associated with your parish for decades; or perhaps you're a relative newcomer.

In any case, your parish church has benefited in countless ways from the thoughtful generosity of those who have gone before you. Your predecessors, in their wisdom, have left their legacy to help strengthen the vision, mission, congregation and buildings of the church, thus preserving its history and traditions.

Now, you have the opportunity to do your part.

Legacy Stewardship Facts

- The Bishops' Legacy Fellowship has 225 members and is growing.
- These members represent 42 parishes throughout the Diocese.
- 95 percent of all these Legacy Gifts are designated to parishes.
- 90 percent of all Legacy Gifts are made as bequests from wills.



"It's surprisingly easy!"

... We are glad to think that someday our gifts will support others in their Christian journey through our Legacy Stewardship gift as we have been supported in ours."

---Susan and Stuart Crompton,
parishioners at St. John's, Williamstown

What is Legacy Stewardship, anyway?

More and more of us are becoming familiar with Legacy Giving in our charitable support of colleges and universities, museums, hospitals, symphony orchestras and other nonprofit institutions.

In the case of the Episcopal Diocese of Western Massachusetts, Legacy Stewardship refers to planned gifts you make to your local parish church, to the Diocese, or to some other Episcopal ministry. After your death, these planned gifts reach their intended beneficiary from your estate. All gifts, regardless of size, are welcomed as a thanksgiving to God for all God has entrusted to us.

Usually, Legacy Stewardship involves financial or estate planning, but that doesn't mean it's only for the wealthy. It includes a variety of ways in which you and all faithful people can look beyond this life and provide for the continuing financial support of your Christian community.



Who Benefits from Legacy Stewardship?

Legacy Stewardship is a generous, forward looking way of taking action about the future. When you make a Legacy Gift, you're choosing to allocate a portion of the resources God has entrusted to you by making a thanks offering just as you are doing when you make your annual pledge or your usual Sunday offering.

- Your gift supports your church with additional resources for future mission and ministry—everything from outreach programs, to music, to memorials, to property maintenance, to special needs of the parish.
- Your gift, with careful planning, may benefit your family and loved ones as well as benefitting the church.
- Your gift enriches your own spiritual life. When we give from our generosity, we reflect the generosity of God.

A Legacy Gift is far more than a gift of money. It's a way of giving thanks for and supporting God's mission and ministry into the future.