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The Episcopal Church of
Saints James and Andrew
Stewardship Team

8 Church St.,
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Time to start Estate Planning?

Consider including a planned gift to
Saints James & Andrew.

*"A planned gift often can
provide significant tax
advantages"*

Ready to learn more?

Call the church office to be put in touch
with our Legacy Giving Advisor.

The Episcopal Church of
Saints James and Andrew

LEGACY GIVING

Making a lasting difference



OUR LEGACY

The mission and ministries of the Episcopal Church of Saints James and Andrew in Greenfield have been made possible by the generous giving of our members and friends since the establishment of Saint James, Greenfield in 1812 and Saint Andrew's, Turners Falls in 1872. We have been the grateful beneficiary of not only the pledges of current members, but also of the generous legacy giving of those who have planned gifts to be made to the church at the time of their deaths.

In the third century of our congregational life we stand on the shoulders of all those who have supported Saint James and Saint Andrew's before us. We are stewards of beautiful historic buildings surrounded by lovely grounds; our physical plant is a valued resource not only for the life of the parish but for the wider community as well.

In the twenty-first century we have become newly committed to the needs of neighbors in Franklin County beyond our own membership and have developed significant outreach ministries that support and tie us to those neighbors. At the same time we are challenged by changes in the wider culture and by the demands of maintaining our property.

OUR ENDOWED FUNDS

The Saint James Endowment Fund was established by the Rev. John B. Whiteman, Rector 1907 - 1952. Similarly, faithful benefactors at Saint Andrew's established an equivalent Endowment Fund. Decades later our church continues to benefit from Rev. Whiteman's generosity and from additional gifts of all sizes by parishioners and supporters of Saint James and Saint Andrew's in the years since.

Income from the endowment is a significant source of revenue on which our annual budget depends. The funds provided by our benefactors help us to maintain and improve our buildings, pay our staff, and extend our ministries to the wider community. Endowment funds have also been used, in recent decades, to make possible urgently needed repairs and restorations of our landmark church and facilities when emergencies arise.

The endowment of Saints James and Andrew is invested on behalf of the church by the Trustees of the Episcopal Diocese of Western Massachusetts and professional investment managers. The Finance Committee of the parish oversees and reviews all endowment activity, reporting each month to the vestry and annually to the congregation.

WHAT IS LEGACY GIVING?

Legacy or planned giving encompasses a variety of ways that gifts can be made to the church from accumulated resources. It usually involves financial or estate planning; however, it is not reserved for the wealthy. Legacy giving is a means by which anyone concerned with the wise use of his or her personal resources makes a considered choice about their ultimate disposition.

Legacy gifts are most commonly made through:

- Adding a partial Beneficiary from a pension or IRA
- A Bequest in a Will or Trust
- A Charitable Gift Annuity
- A Charitable Remainder Trust
- Gifts of Special Assets (real estate, closely held stock, life insurance, retirement accounts)

Legacy giving establishes a way for a donor to provide for family members while remembering the church as well. It often enables the donor to provide more for his or her heirs and to make a larger gift than thought possible. It often reduces taxes as well.

Planned legacy gifts can be designated for an organization's general funds or its endowment.