
Thank You For Considering A Legacy Gift

____ I/We are considering a gift. Please send me/us a copy of the Legacy Fund Policy and Agreements.

____ I/We have already included the Christian Church in North Carolina in our estate plans.

____ You may include me/our names(s) in your Legacy listing.

OR...

____ I/We prefer to remain anonymous.

Name _____

Mailing Address:

Phone # _____

Email _____

My/Our questions are....



You may want more information. We will be happy to answer any questions you may have. If needed we may arrange a visit.

Please contact:

Christian Church (Disciples of Christ)
in North Carolina
P.O. Box 1568
Wilson NC 27894

Bishop Valerie Melvin
Regional Minister
valerie@ncdisciples.org
252-291-4047 ext. 201

Rev. Kathy Smith
Regional Treasurer
ekathys@gmail.com
919-896-1831

Rev. Rex Horne
Endowment Committee Chair
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252-249-7227

The Legacy Fund

**Christian Church
(Disciples of Christ)
in North Carolina**



The Legacy Fund has been established to "...expand the witness and mission of Jesus Christ in the world through the ministries of the Region."



The Ministry of the Region

For many years, congregations of the Christian Church (Disciples of Christ) in North Carolina, have worked together in covenant partnerships to enhance and extend the ministries of Christ through what is now known as the Region. Because of the Region, strong and vibrant youth, men and women's ministries have engaged and nurtured faith development for thousands over generations. Through the Region, congregations and ministers have received needed support and guidance. The Region continues to provide a vehicle for Disciples to work, worship, grow, serve and fellowship together, through assemblies, districts, fellowship groups, and retreats. The Region also makes possible the camp, conference and retreat programs at Camp Caroline, as well as three Regional camps offered at Christmount. ***In the Region, we accomplish God's work together in ways not imaginable alone.***

What is the Legacy Fund?

The Legacy Fund is a *permanent* fund. Some people use the term endowment fund. Gifts to the Region's Legacy Fund are invested in accordance with the fund's adopted written policies. Only the income from the fund is disbursed and used to support the Region's ministries.

You Can Make a Lasting Impact

Permanent fund gifts create a legacy for each donor, continuing the commitment of the donor to Christ beyond his/her lifetime. Through your gift to the Legacy Fund your name or your family's name will be remembered in the life of the church for many years to come.

This helps assure that the Region's ministry will continue for future generations. For many it will be a means to say, "Thank you, you have made a difference in my life or in the life of someone I love." It will also encourage others to consider how their own lives have been changed so that they will want to join in this ongoing work.

How Can I Make a Gift to the Legacy Fund?

For some, gifts made during the donor's lifetime are used to establish a permanent fund, but for most, end of life gifts are used for this purpose. There are many ways to make an end of life gift, such as bequests through a will; beneficiary designation for life insurance, IRAs and other retirement assets; and life income gifts. Current or end of life gifts may be made in the form of money, or tangible property such as land, homes, or autos. Please note that it is important to explore this option in advance with the Regional Minister, Treasurer, or Chair of the Endowment Committee to assure that the gift can be received by the Region. You should also consult with your financial planner concerning any charitable gifts.

How Will My Gift Be Used?

YOU will determine how your gift will be used. First, you choose whether to make a restricted or unrestricted gift.

In accordance with the Legacy Fund policy as approved by the Regional Board, 90% of the income from the Unrestricted Fund will be used for the support of all the Region's ministries as needed and determined by the budgeting process. A tithe, or 10%, of unrestricted income

will be used to support the Disciples Mission Fund, expanding the impact of such gifts throughout the entire family of Disciples of Christ in the U.S. and around the world.

Restricted Funds will be established by a mutually agreed upon permanent gift between the Region and the donor. Whatever ministry/ ministries of the Region are chosen (such as Youth, Men's, Women's, Camp Caroline) all income will be used solely as directed by the donor. It is important to explore your intentions with the Region's leaders ***before*** establishing a restricted gift.

Donors may establish named funds to honor someone such as a minister, church, or loved one. All unrestricted gifts of \$100 or more can become named funds and will be received, recognized, recorded and tracked by the Region as a part of the Region's unrestricted Legacy Fund. Restricted funds for a specific purpose may also be named to honor someone and begin at the \$10,000 level. A donor may meet this \$10,000 level over a period of 5 years, with an initial gift of at least \$1,000. No distributions will be made from restricted funds until \$10,000 has been attained.

Whether unrestricted or restricted, only the income will be used. Historically, that has been in the 3-5% range annually. Legacy Fund gifts will be invested with the Christian Church Foundation and will be managed by the Region. The Christian Church Foundation will be consulted in determining the income distributions with an eye to protecting the principal of the fund.

