

THE ST. JOHN'S EPISCOPAL CHURCH

LEGACY SOCIETY

What is the Legacy Society?

The SJE Legacy Society is a group of those currently living who have chosen to include St. John's in their estate planning and have given the Parish Office a record of the designation.

What is the Vision of the Legacy Society?

The SJE Legacy Society's vision is to encourage careful consideration and planning of estate matters and to invite all those who support the ministry of St. John's to make an enduring gift to our Endowment, ensuring our ministry remains strong and vibrant. These gifts are acts of hope for the future of our parish and they resonate throughout our parish history.

What is involved in the Legacy Society?

When someone becomes a member, their name is added to a plaque outside the nave doors in honor and recognition of their gift. Once a year, all Legacy Society members will be honored at an Annual Members' Dinner. Additionally, the Rector and Vestry may reach out to the Legacy Society for consultation when they are discerning a question on the life and ministry of the parish, so that they may keep the long view in mind.

When someone dies, their name remains on the plaque until the next Members' Dinner. At that Dinner, their name is read aloud and is recorded in our Memorial Book, along with a record of their gift.

What governs the Legacy Society?

As a ministry of the parish, the Legacy Society is ultimately governed by the duly-elected Vestry of the parish. However, the Vestry has constituted a Legacy Society Committee to assist the Vestry in the work of growing the Society and in making recommendations for questions that pertain to the life of the Society. A new Legacy Society Committee member is elected each year at the Annual Member's Dinner to serve a three-year term, creating a three-person body with rotating membership. After the election of the Committee, the Vestry considers Legacy Society Committee members to ensure that the Endowment Committee always contains at least one member of the Legacy Society as well.

What constitutes a Legacy Society Gift?

A legacy gift is intended to provide long-term financial support or other on-going benefits for the church in memory of an individual or family. A legacy gift is recognized as a gift to strengthen church finances, equity, structure, or value for the future. Generally, there are three types of gifts that would result in membership in the Legacy Society:

1. When someone makes provision in their will for an estate gift of any amount to be given to the parish at the time of their death and also records the provision for that gift with the Parish. *This is the most common.*
2. When someone makes a substantial gift to the Consolidated Endowment Fund, usually more than \$10,000, before they die. *Gifts of a lower amount to the Endowment Fund may still be recognized with membership in the Legacy Society upon recommendation from the Legacy Society Committee and action of the Parish Vestry.*

3. When someone makes a substantial gift to the ministry of parish, usually with a value of more than \$10,000, using funds that would normally have been given at time of death. *This usually happens when someone had intended a significant bequest in their estate, but decides to give the gift while they are still living so they may see the fruits of their gift before they die. Gifts of a lower amount that have a legacy aspect to their donation may still be recognized with membership in the Legacy Society upon recommendation from the Legacy Society Committee and action of the Parish Vestry.*

If someone does not fall into one of these three categories, but wants to make a gift and believes it falls within the ideals and the goals of the Legacy Society, they may petition for membership by sharing the plans for the gift with the Legacy Society Committee who may then make the appropriate recommendation to the Parish Vestry.

SJE LEGACY SOCIETY • APPLICATION FORM

To the glory of God and in thanksgiving for the mission and ministry of God’s church, I/we have made a gift for the future ministry of St. John’s Episcopal Church in Grand Haven, MI and I/we accept the invitation to join the Legacy Society.

I/we consent for my/our name/s to appear with others on the public roster of the Legacy Society. On the roster of the Legacy Society, I/we wish my/our name/s to appear as:

OR, I/we wish to remain anonymous.

I/we would like our gift to be designated as follows (please feel free to attach a separate sheet of paper if your designation is not easily described by the table below). Please also attach a record that documents this designate (e.g., a copy of the will, trust, insurance policy, etc.)

Dollar Amount or % of Estate	Designation
	Original Endowment Fund – <i>Supports the operating budget of our parish ministries.</i>
	Daniels Trust – <i>90% of draw supports the operating budget of our ministry, 10% reinvested for growth.</i>
	Idema Mission & Outreach Fund – <i>Supports parish mission & outreach ministries.</i>
	Landscaping Endowment – <i>Supports the maintenance and beautification of campus.</i>
	Building Endowment – <i>Supports improvements to building and property.</i>
	Music & Fine Arts Endowment – <i>Supports the parish musical and arts ministries.</i>
	Unrestricted – <i>The Vestry may determine the best designation given their sense of need.</i>
	Hill Family Christian Education Fund (held by GHACF*) – <i>Supports children & youth faith formation.</i>
	St. John’s Altar Guild Fund (held by GHACF*) – <i>Supports our Altar Guild Ministries</i>

*GHACF – Fund held by the Grand Haven Area Community Foundation and not the Parish.

Signature

Date

Name/s

Address, City, State, Zip

I certify that I am aware of this gift and that I will honor the intentions of the donor.

Signature of Executor of the Estate: _____ Date _____