



St. Michael's Episcopal Church
 647 Dundee Ave, Barrington IL 60010 (847) 381-2323
www.stmichaelsbarrington.org/ministry/stewardship/memorials

**The St. Michael's Church Legacy Fund
 Planned Giving Program - Intention to Donate Form**

Planned gifts to the St. Michael's Church Legacy Fund express gratitude for our blessings and enables long-term stability for future generations to lead lives filled with God's love and the Holy Spirit. The Legacy Fund recognizes the need to invest in the future, unlike the offering plate and pledges, which support the church's annual operating expenses. The Legacy Fund receives donations for endowment purposes, with the principal preserved in perpetuity to allow it to grow substantially over the years. To learn more, our Rector and Wardens are available to meet with you.

Please indicate how you would like to support the Legacy Fund:

- Memorial gift in the name(s) of:** _____ . *Gifts in remembrance at the time of death, or on the anniversary of birth or death. Please provide the dates of birth and death of your loved one: _____ . Remembering our departed loved ones is an act of love and can bring us peace. Obituaries may reference donating to the "St. Michael's Church Legacy Fund".*
- Honorary gift in the name(s) of:** _____ . *Gifts that acknowledge gratitude, recognition or respect during a person's lifetime. Please provide reason/occasion: _____ . Examples include birthdays, anniversaries, retirement, relocations and other special occasions. Invitations and announcements may reference donating to the "St. Michael's Church Legacy Fund".*
- End-of-year charitable tax planning gift.** *We encourage you to consult with your tax advisor regarding tax efficient ways to donate to the church for long-term endowment purposes.*
- End-of-life gift.** *These planned gifts create your personal legacy through your estate plan and can bring peace of mind. Inclusion in your Will or Trust ensures that your family, friends and future generations will know that St. Michael's was important to you. Your gift intention may be increased, decreased or eliminated should financial circumstances change. Please provide a copy of this form to your executor and estate attorney.*
- Other legacy gift.** *These gifts are intended for other long-term endowment purposes.*

I/we intend to give in the following way(s):

- | | |
|--|---|
| <input type="checkbox"/> Cash/check/debit/credit
<input type="checkbox"/> IRA or other qualified assets
<input type="checkbox"/> Life insurance beneficiary designation
<input type="checkbox"/> Through a Will, Trust or other estate planning document
<input type="checkbox"/> Through a Required Minimum Distribution ("RMD") of a retirement plan | <input type="checkbox"/> Stocks, Bonds or other investment securities
<input type="checkbox"/> Retirement plan beneficiary designation
<input type="checkbox"/> Real estate or other tangible asset
<input type="checkbox"/> Other _____ |
|--|---|

The expected value of my/our gift is:

- \$ _____ exactly approximate _____ % of gift type indicated above
 Undetermined at this time

THANK YOU! All gifts and commitments to give are appreciated. The church will send an acknowledgment of memorial and honorary gifts to the family. Please provide the family contact information for this purpose:

Name _____ Relationship _____
 Phone _____ Home Address _____
 Email _____ What is your relationship? _____
 Gift acknowledgment letters to the family will not disclose the amount of the gift unless you indicate otherwise.

Signature _____ Date _____ Signature _____ Date _____

Full Name (printed) _____ Full Name (printed) _____