



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 enable future generations to lead lives filled with God's love. Donors are provided with a meaningful way to provide long-lasting impact in our community and allows the church to continue God's work far into the future. We are grateful to be able to offer this long-term giving option to invest in the future, which has received gifts for endowment purposes since 2003, and has preserved the principal in perpetuity allowing it to grow substantially over the years. The Legacy Fund recognizes the need to save for resilience against economic uncertainty (like a saving account), whereas the offering plate donations and pledges support the church's annual operating expenses (like a checking account). St. Michael's, a non-profit religious corporation (FEIN 36-2541957), collaborates with the Episcopal Church Foundation and State Street Investment Management to honor the past and build the future with sustainable growth. Please complete this form and place it in the offering plate, or see our Rector or Wardens to learn more.

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 brings us peace. Obituaries may reference donating to the "St. Michael's 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 in Thanksgiving to God. Invitations/announcements may reference donating to the "St. Michael's 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. Did you know that charitable giving can reduce your adjustable gross income and potentially lower your Medicare premiums? It can also reduce your retirement RMD tax liability.
- End-of-life gift.** These gifts are planned through your estate plan and can bring peace of mind. Inclusion in your Will or Trust lets your family, friends and future generations 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 gift for legacy endowment.** For example, charitable gifts of appreciated stock that avoid capital gains tax.

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 in the future are appreciated. We will contact you to discuss if and how the gift should be recognized and to discuss sending a gift notification letter to the family of the person being remembered or to the person being honored. Gift notification letters do not disclose the amount of the gift but rather share that the person is being remembered or honored in a meaningful and thoughtful way.

Signature _____ Date _____ Signature _____ Date _____
 Full Name (printed) _____ Full Name (printed) _____
 Home Address _____ Email _____
 Phone _____ If this is a memorial/honorary gift, what is your relationship? _____