

## Life Insurance:

You can purchase a new policy and make Saint John's the owner and beneficiary of the policy. You can also make these changes to an existing policy that you own or make Saint John's a direct or a contingent beneficiary of an existing policy.

## Gifts of Special Assets

Real estate, stocks, mutual funds, retirement assets and other types of assets can be used in the planned giving process.

**NOTE:** You should always discuss your plans with financial and legal advisors before you make any gifts.

## Designation of your Gift

You can designate your gift for a specific purpose. However, the most efficient way to fund St. John's future is to bestow your gift undesignated. This way the gift will be invested in the St. John's account within the Episcopal Church Foundation of the Diocese of Pennsylvania. The Church Foundation is a professionally managed foundation designed to provide current and future funding for participants (such as St. John's) by maximizing long term financial returns. Currently 18.5% of St. John's annual expenses are funded by returns on our investments in the Church Foundation. The goal is to dramatically increase this amount for the future of St. John's

*On the front of the brochure is the drawing of The Old Log Church, an illustration by Anne Hannum Korte and is her conception of Saint John's first building of worship..*

I/We are interested in learning more about the 1702 Society and planned giving options.

☐ Bequest in a Will

☐ Life Income Gift

☐ Life Insurance

☐ Special Assets

☐ Other information

☐ I/We would like to speak with someone confidentially about legacy stewardship

☐ I/we have already made a provision of a planned gift and would like to be a member of the 1702 Society

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Please return this form to:

Office of Saint John's Concord  
576 Concord Road  
Glen Mills, PA 19342

OR

Call the office, 610-459-2994 to have a member of the Stewardship team contact you.

## Saint John's Concord Episcopal Church



## The 1702 Society

### Ensuring the Future of Saint John's

*"For we brought nothing into this world,  
and it is certain  
we can carry nothing out"  
(1 Timothy 6:7-8)*



## Your Legacy; Saint John's Future

We all care about some things. In fact, we care about them so much that we look for them to continue, to develop and to thrive even after we have gone. Certainly our families and loved ones are at the top of this list so, if possible, we plan for their future. In doing so we hope to ensure they may have the resources necessary to thrive.

As a member of St. John's Episcopal Church you show that you care about the church's mission in reaching all generations through fellowship and advancing our outreach programs to assist those less fortunate. You show your care by attending services and activities and by pledging your treasure so that St. John's can continue its mission.

*But, how do we ensure that St. John's good works will continue in the future?*

By establishing your legacy through planned giving you will be providing a lasting benefit to Saint John's so that it can continue to serve families and continue its outreach programs well into the future.

## Funding Future Ministries

When we make a planned gift to the future of Saint John's we are stating that we care about our ministry and wish for it to continue in the future. As stewards of Saint John's, we all provide the treasure necessary to fund our annual operations. We all have a tendency to live in the present so we usually respond to annual stewardship and specific capital campaigns with our current income.

However, a planned gift comes from accumulated assets and may be the largest gift a donor ever gives. Often a person's ultimate gift, or their legacy, is their final statement of support to a ministry or a cause that is dear to their heart.

### 1702 Society

The 1702 Society has been formed at Saint John's to honor individuals who make gifts to Saint John's through Planned Giving in conjunction with their estate plans to preserve Saint John's for future generations.

Gifts to Saint John's through the 1702 Society are acts of hope for the future of our parish. Through God's grace and your generosity, Saint John's will be well equipped to serve our community for generations to come. The 1702 Society will provide the infrastructure and tools so that each person will have the confidence to remember Saint John's in their last will and estate plans.

## Benefits

Planning your estate establishes a way for an individual to provide for family members while remembering Saint John's as well. It may also enable the donor to provide more for his or her heirs and to make a larger gift than thought possible. It may even reduce taxes.

Each member of the 1702 Society will be honored by an inscription on a plaque to be placed in a prominent position in the church. In addition a special badge will be provided identifying the individual as a member of the society.

## Forms of Planned Giving

### A Bequest in a Will:

The easiest and most common way of making a planned gift is through a bequest in your will. You can designate a specific amount of money, a percentage of an estate, or a specific asset. Saint John's could also be named as a contingent beneficiary.

### Life Income Gift

These more complex vehicles such as a charitable gift annuity, a charitable remainder trust or pooled income fund to provide you and/or your designated beneficiary income for life. Upon your passing the church receives to total value of the original gift. Life income gifts generally reduce or eliminate certain taxes and guarantee an income for you for life.