

Providing For The Future

Our Endowment Fund can grow and provide funds for future generations only through *your participation*.

Remember, *no gift is too small*. Many small gifts accumulate to significant dollars!

Please think and pray about the following questions:

- Have I provided adequately for my family heirs in my estate plan?
- How important is Good Shepherd and my church family in my life? Does my Will reflect that?
- Have I listed other charities in my Will or Trust?
- Am I leaving a gift to the Church Endowment Fund through my estate plan?

Heritage Society

The Rod and Staff Society was formed in 2013 to celebrate the 50th anniversary of The Church of the Good Shepherd Endowment Fund. Its purpose is to recognize and thank those individuals and families who have committed to Good Shepherd's future by remembering the Endowment Fund in their estate plans through a documented planned gift. More so, the Society serves to enable members and friends to witness to the value of Good Shepherd in their lives and secure its ministries for generations to come. All Rod and Staff Society members will be honored at an annual members' dinner and names of new members of the Rod and Staff Society will be added to a plaque displayed in the church narthex.

Discuss ways of giving with your family, accountant, attorney, or financial advisor. Or, please feel comfortable talking with the Rector or any other Board member.

You may become a member of the Rod and Staff Society simply by confidentially confirming on the church office form that you have named the Church of the Good Shepherd Endowment Fund as a beneficiary in your Will or estate plan.

*"We make a living through what we get,
We make a life through what we give."*

Winston Churchill

As Christians, our lives reflect our whole-hearted response of love and gratitude to the God who richly blesses us. Therefore, we share our blessings.

This desire to share of God's blessings has inspired another opportunity for stewardship at The Church of The Good Shepherd. The Endowment Fund offers a means by which sharing may take place now, sharing may be planned for a future date, or sharing may be assured from one's estate after death. It allows those with small financial assets as well as those with significant financial assets an opportunity to express their appreciation for blessings from God.



Legal name:

THE CHURCH OF THE GOOD SHEPHERD
ENDOWMENT FUND, INC.

Federal tax ID Number:

59-6140984

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Our Endowment Fund

What is it?

Incorporated in 1963, the Endowment Fund was created to receive gifts to be managed for the benefit of The Church of The Good Shepherd. A Board of Trustees elected by the parish, and our Rector are fiduciaries for the Endowment Fund.

Why was it created?

It was created to provide an entity that can grow to carry on the work of our parish, supporting both current and future needs of the congregation and community. The Endowment Fund is our investment vehicle for the financial security of our church. It enables our church to more completely fulfill its mission by supporting ministries beyond our annual operating funds.

Why is it important to me?

The Endowment Fund has grown exclusively through the generosity of parishioners and friends of the church. This fund is increasingly important for the support of The Church of The Good Shepherd. Distributions from the Fund have permitted improvements in church property, supported ongoing operations, allowed us to purchase several adjacent pieces of property, and enhanced outreach ministries. Through careful estate planning and prudent shepherding of our God-given resources, we each have the opportunity to continue our Christian stewardship into the future by naming The Church of the Good Shepherd Endowment Fund in our Will or Trust.

How can I make a gift to The Church of the Good Shepherd Endowment Fund?

No one should feel that because he or she cannot make a large bequest that a gift should not be made. The church sincerely appreciates each and every gift presented to our Endowment Fund, regardless of its size.

1. Bequests by Will...The easiest and the most common way of making a planned gift is through a bequest in your will. Or, consider creating a Living Trust to reduce assets subject to probate. Gifts may be designated as a percentage (%) of your estate or a specific amount of money.

2. Life Insurance Policy...Change the beneficiary of an existing paid-up life insurance policy to the Endowment Fund or name the Endowment Fund as the beneficiary of a percentage (%) of the insurance policy, for example 20% to 75%. Or, you can purchase a new policy and make the Endowment Fund the owner and beneficiary of the policy.

3. Retirement Fund Gifts...Do you have a company pension plan? Or, do you have a 401(k), an IRA or 403(b)? It is possible to remember the Endowment Fund by a simple designation on your beneficiary form. Just contact the custodian of your account(s) to specify your wish of naming a specific dollar (\$) amount or a percentage (%) to be given to the Endowment Fund upon your death.

4. Gifts of Appreciated Securities...Making gifts of appreciated stock or other securities offers substantial tax advantages. The giver pays no capital gains tax on the gift of appreciated securities and may when computing taxes claim as a charitable deduction the full market value of the securities at the date of the gift.

5. Managed by the Episcopal Church Foundation:

• **Charitable Remainder Trust...**A lifetime income plan is created by irrevocably transferring a minimum of \$100,000 of assets for tax benefits to a trust that pays you a fixed dollar amount annually. Other persons or survivors may be included for their lifetimes. Then, the principal transfers to the Endowment Fund.

• **Pooled Income fund...**A giver irrevocably transfers a minimum of \$100,000 in cash or securities for tax benefits to a pooled income fund and receives variable monthly income for life based on the total earning of the gift. At death, the gift becomes the property of The Endowment Fund.

• **Charitable Gift Annuity...**Make an irrevocable transfer of money or securities for tax benefits and enter into a contract to pay a fixed annual amount for life. Upon your passing, the Endowment Fund receives your gift.

6. Unique Gifts...Do you have a gift in mind that has not been mentioned? Please discuss your unique gift idea with Pastor Becky or any other Board member.