

Yes, I am interested in supporting the St. Margaret's Episcopal Church Endowment Fund!

Name

Address

Phone

Email

I am interested in supporting the Endowment Fund in the following way(s):

With a Gift included in my Estate Plan*:

- Inclusion in My Will
- Life Insurance Beneficiary
- Retirement Account Beneficiary
- Charitable Gift Annuity

- With a Current Gift*
- Undesignated Cash Gift
- Assignment of Stock

I have already named St. Margaret's Episcopal Church in my Estate Plan.

I would like more information or to talk to a representative of the Endowment Fund.

*Donors of Estate Plan gifts will be named to the Legacy Society.



Please return this form to the Endowment Fund Committee at St. Margaret's Episcopal Church at 12663 Perkins Road, Baton Rouge, LA 70810. You may also contact the Endowment Fund Committee at endowment@saintmargarets.com. A representative of the Endowment Fund Committee will contact you upon receipt of a completed form or notification from you to confirm your gift arrangements and intentions.



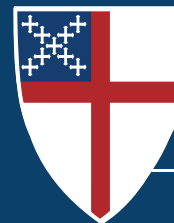
Photo by Maria Curry

For more information

on giving to the Endowment Fund or becoming an Legacy Society Member, brochures are available in the narthex of the Church or you may email your inquiry to the Endowment Fund directly at endowment@saintmargarets.com

St. Margaret's strongly urges you to consult with your attorney, financial and/tax advisor to review the information provided to you without charge or obligation. This information in no way constitutes legal or financial advice.

12663 Perkins Road
Baton Rouge, LA 70810
225.766.8314
saintmargarets.com



**ST. MARGARET'S
EPISCOPAL
CHURCH**
BATON ROUGE

Endowment Fund & Legacy Society



The Mission of the Endowment Fund is to provide a means by which parishioners may financially assist the Mission and Ministry of St. Margaret's Episcopal Church, Baton Rouge, now and in the future.



HONOR
the past



WITNESS
the present



PROVIDE
for the future

Good Stewards: We are stewards of God's bounty, caretakers for the brief period that we are given on this Earth, of time, energy, and resources. What we do with these gifts ultimately defines the character of our lives and our impact on the lives we touch. Through a robust Endowment Fund, we can help preserve and replicate the spiritual and fellowship experiences we have today for the benefit of future congregations.

Purpose: The Endowment Fund helps ensure the preservation of the Church's Godly mission and its ministries. We invite parishioners to help support the Endowment by making a donation. The Church Vestry established the Endowment Fund in 2018. The Legacy Society was recently established to recognize those donors who include the Church in their estate plan.

Management and Investment: The Fund is managed by the Episcopal Church Foundation (ECF) and overseen by the Endowment Committee and the Vestry, under investment policies approved by the Vestry. The Endowment Committee provides quarterly updates to the Vestry on Fund management and performance.

Join the Legacy Society

Enrollment for the Legacy Society is available for download on the Church website at SaintMargarets.com. A representative from the Endowment Committee will contact you upon receipt of a completed form or notification from you to confirm your gift arrangements and intentions.

There are two ways of donating to the Fund:

1 Current gift, in any amount, may be made payable to the Endowment Fund.

Gifts can be made in honor of someone or in someone's memory, if the donor chooses. Gifts can be unrestricted or restricted (designated) as to use. Gifts that are designated, if consistent with the gift acceptance policies of the Fund, will be accepted and used for the purposes given.

Donations of real property are also welcome, if approved in advance by the Endowment Committee.

Gifts given without restrictions enable the Endowment Fund and the Vestry to address needs as they deem necessary.

2 Planned or estate gifts will enroll the donor in the Legacy Society. You are advised to consult with a financial advisor and/or legal counsel regarding this type of gift.

Planned gifts may be made through many means, including testamentary (will) bequests and beneficiary designations in retirement funds or life insurance policies.

These can also include gifts of real property. Gifts of real property must be consistent with the gift acceptance policies of the Endowment Fund.

Those who choose to make a planned gift will be added to an honor roll of the Legacy Society of St. Margaret's, unless the donor prefers to remain anonymous.