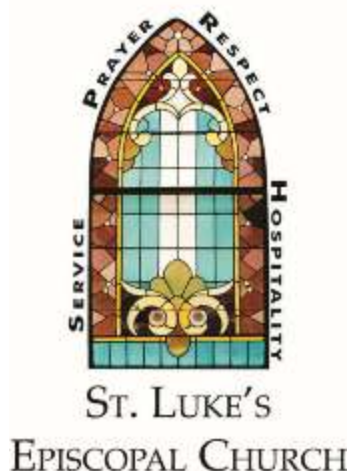


PLANNED GIVING BRIEF



As part of our Congregational Development program, we established a goal of creating a financial reserve for St. Luke's in the amount of \$500,000 over the next few years. This fund will be used for capital and major maintenance projects as well as special ministry and outreach projects. We intend to meet our goal via a Planned Giving Program.

What is *Planned Giving*? Very simply, it is a plan for you or any parishioner to contribute financial or other assets to the Church either in current time-frame or upon your death. This is gifting beyond our normal annual operating pledge. The simplest way to do this is to make St. Luke's the beneficiary of a gift via your will or trust. A surprising number of people do not have a will or trust so upon their death, the State will determine how your assets are distributed. That should not happen.

Our goal is to encourage all our parishioners to consider making St. Luke's a beneficiary of a portion of your assets either now or upon your death. If you have a will or trust, we would encourage you to include St. Luke's as a beneficiary. If you do not have a will or trust, we would suggest that you have your family or estate attorney prepare one for you. If you do not have an attorney, we would be pleased to help you in obtaining the assistance of one. Please ask a member of this committee for help with legal assistance.

Won't your peruse the Planned Giving Guide prepared by the Episcopal Church Foundation. It is available [here](#) or in the Parish Office. This guide outlines several ways you can participate in Planned Giving - the simplest way is through a will or trust.

We look forward to the success of our Planned Giving Program and to your participation.

Thank you.

St. Luke's Planned Giving Investment Committee