**What is Planned Giving?**

Planned giving comprises a variety of ways that charitable gifts can be made to St. Anne’s from our accumulated resources. It usually involves financial or estate planning, although it is not reserved only for the wealthy. Personal estate and gift planning are means by which each person who is concerned with the wise use of his or her personal resources makes a considered choice about their ultimate disposition.

Planned giving is a set of ways you can leave money or other assets to a nonprofit or organization, such as St. Anne’s, upon your death or a way to invest money so that you receive benefits during your lifetime and then pass on the remaining funds to St. Anne’s or another nonprofit, either upon passage of time, the occurrence of a certain event, or upon your death.

“Give thanks in all circumstances; for this is the will of God in Christ Jesus for you.” 1 Thessalonians 5:18

Various financial instruments are available that you can adapt to your personal needs and situation. In general, planned gifts are made through:

* A bequest in your Will
* A gift of assets, such as Real Estate or Securities (Bonds, Mutual funds, Stocks)
* Designating a beneficiary in a Life Insurance Policy, IRA, IRA Rollover, 401K, or Life Income Gift (e.g., a Charitable Remainder Trust, Charitable Gift Annuity or Polled Income Fund)

Planned giving establishes a way for us to provide for family members while also remembering St. Anne’s. It often enables us to provide more for our heirs and make a larger gift to the church than otherwise possible. Quite frequently it reduces taxes, as well.

Planned giving enables you to distribute financial resources to provide for yourself and your family, as well as to help provide a means to enable St. Anne’s to carry out its mission. You can ensure that your financial generosity is used in exactly the way you want it to be. Anyone can take advantage of this opportunity. There is no minimum amount for a planned gift.

**What can Planned Gifts do?**

Your generosity in making a planned gift can:

* Strengthen the church’s financial future
* Support a ministry especially important to you
* Honor your family, a loved one, or friend
* Promote and grow the church’s outreach efforts, its youth ministry, its music program and generally enable it to carry out its mission

**How are Planned Gifts used?**

At St. Anne’s, unless otherwise specified by the donor, planned gifts are deposited into restricted funds and then used for various projects and ministries in and through St. Anne’s. With large, designated gifts, we place them in the Diocese of North Carolina’s Common Trust and use the quarterly disbursements on projects and ministries that align with the gift-givers wishes. These funds will be used to support St. Anne’s mission, in accord with the designated intent of each donor for designated ministries (Youth, Outreach, Music), the maintenance and improvements of our buildings, or to provide seed money toward special projects or new ministries. The rector, along with members of the finance committee and oversight committee will help the church use each gift in ways that glorify God and honors the wishes and intentions of the one who gave the gift.

**What is the next step?**

If you would like to consider making a planned gift, first talk it over with your family so they understand your wishes. Next, set a time to meet with the rector or a member of the Finance Committee who can discuss this further with you. We encourage you to work with your trusted advisor be it your accountant, attorney, or financial advisor to ensure that the option you choose is appropriate for your particular circumstances.

We would be happy to discuss with you how a charitable gift can be an important part of your estate plan. Large or small, your planned gift is your legacy to ensure that St. Anne’s remains alive and vital, continuing to serve, enrich and provide for the spiritual needs of all while filling this world with our Sweet, Sweet Spirit. St. Anne’s appreciates your interest and support.

St. Anne’s Episcopal Church and members of its Finance Committee are not engaged in rendering legal or tax advice. For advice and assistance regarding planned giving, please consult an attorney, financial adviser, or other professional.