

# How to make a Legacy gift

*Drop this in the offering plate or mail to:*

St. Andrew's Episcopal Church  
1900 Pennsylvania Avenue  
Allentown, PA 18109

*Enclosed is a gift of \$ \_\_\_\_\_ for the Legacy Endowment fund.*

**OR** *I pledge a gift over a three year period. I will give \$ \_\_\_\_\_ in 2024.*

*I will give \$ \_\_\_\_\_ in 2025. I will give \$ \_\_\_\_\_ in 2026.*

Name \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ Zip code \_\_\_\_\_

Phone \_\_\_\_\_

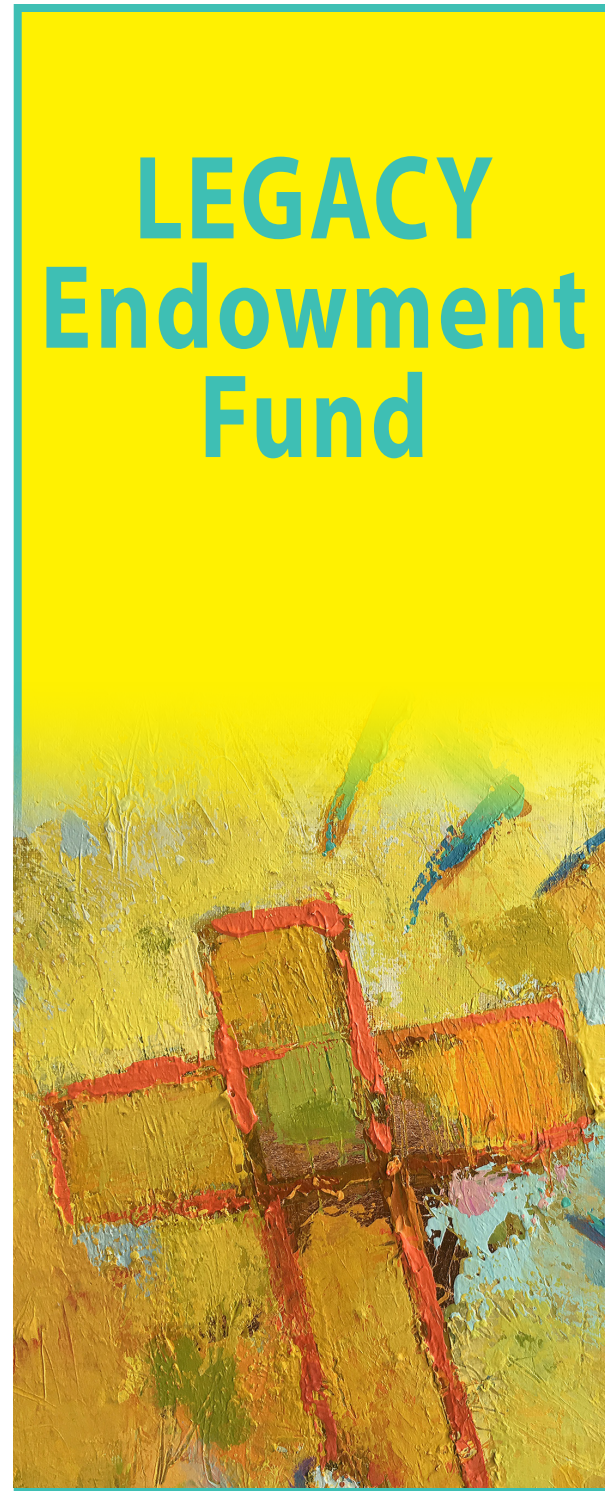
Email \_\_\_\_\_

- ☐ I would like to be acknowledged as a Legacy donor.  
☐ I would like to remain anonymous.  
☐ I would like more information and/or a personal visit.



1900 Pennsylvania Ave., Allentown, PA 18109  
610-865-3603 · [www.standrewsbethlehem.org](http://www.standrewsbethlehem.org)

# LEGACY Endowment Fund





## A Gift for Future Ministry

A church cannot fulfill its mission and vision if it does not have adequate resources, both now and in the future. An endowment fund allows your church to be a good steward of the gifts entrusted to it, fueling its vitality for years to come.

*In addition to your regular giving to St. Andrew's Episcopal Church, you may make a single or periodic gifts of \$1,000 or more to the church's Legacy Endowment fund. Life insurance and other assets that can easily be converted into cash, such as publicly traded securities, are appropriate to donate to the endowment fund. All gifts are tax-deductible to the extent allowed by law. The endowment provides a wonderful opportunity to watch the fund grow during your lifetime.*

## Gratitude Giving

Supporting the Legacy Endowment fund is one of the best ways you can ensure that St. Andrew's mission and vision will thrive for years to come. Create an enduring legacy with a gift that will support parish ministries in perpetuity. *Gifts may be made in life, by bequest, or on a deferred basis.* Also, a gift of \$1000 or more may be pledged and subsequently donated over a three year period.

The Legacy Endowment is invested in the Diocesan Investment Trust (D.I.T.). Distributions are made annually in accordance with strict Vestry policies that preserve the principle and grow the fund.



**Q: How will the Legacy Endowment benefit the church?**

**A:** The Vestry will have the discretion to use the annual disbursement, or a portion thereof, for capital needs of the parish, operating expenses, and/or to underwrite special ministries and projects. Such grants will provide enhancements that will be important to our parish's ongoing vitality and ministry; enhancements that are beyond the reach of annual operating revenues.

**Q: What restrictions are in place for the use of these funds?**

**A:** The principle is expected to generate earnings that can be spent, only for the use intended to support mission and ministry expenses of the Parish.

**Q: What happens if financial performance does not equal the spending policy of the fund?**

**A:** Short-term differences can arise where the earnings are greater than the spend and visa versa. A Legacy Fund Committee has been established to monitor the investment progress and guide the spending policy such that the earnings and spending amounts achieve equilibrium, in order that the Legacy Fund is able to continue to generate future income for use in its intended purpose over the long term.

**Q: What happens to the fund if St. Andrew's ceases to exist as it is today, through merger, dissolution or some other event?**

**A:** If the Parish ceases to exist, disposition or transfer of the Fund shall be at the discretion of the Vestry in conformity with the diocesan canons and the Bishop of the Diocese of Bethlehem.