

## *My Options!*

We ask you to prayerfully consider opportunities to strengthen the St. Mark's community. Our office can provide you with additional information – please fill out this form below and return it to our office or feel free to contact us with any questions.

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip Code \_\_\_\_\_

Phone \_\_\_\_\_

I would like more information on the following areas:

\_\_\_\_\_

Please send to:

Planned Giving  
St. Mark's Episcopal Church  
600 Colorado Ave  
Palo Alto, CA 94306  
(650) 326-3800

Email: [info@saint-marks.com](mailto:info@saint-marks.com)

## **Christian Stewardship & Spiritual Growth**

God has abundantly blessed every one of us. Our calling as God's people is to use God's gifts for the building up of the people and for the benefit of God's world.

Planned gifts are an important way to share our gifts, helping to ensure the future of our church and its mission.

Whether you choose to make a planned gift now or later, we encourage you to learn more about planned giving. By returning to God what is God's and contributing to God's work in the world, we grow spiritually while helping others.

Planned gifts can be directed to support programs in the parish, in the diocese or in the national church. Or you can direct your gift where you see a specific need at any of these three levels.

A gift to St. Mark's Endowment Fund supports our wonderful campus and all the ministries of the parish.

A planned gift to the Parish of St. Mark's could serve any number of purposes. You could choose to direct your gift to support programs such as:

- **Education and Programs**
- **Buildings and Grounds**
- **Worship and Music**
- **Outreach**

## *Discover How Planned Gifts Can Strengthen Our St. Mark's Community*



## *With Gracious & Generous Hearts*

*(Acts 24)*

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# What is Planned Giving?

A planned gift is a gift deferred – a way of expressing your wishes **now** about how your resources are to be used **later**. A planned gift is a commitment made to protect those you love – and an opportunity to benefit the Church for generations to come.

Planned giving is not separate from Christian Stewardship, but is rather an important part of it. Planned giving offers ways – over and above our regular support to the Church’s on-going work – to share God’s gifts with others, and to grow spiritually as we live out our vocations and ministries within the mission of the Church.

## Ways to Give

There are many types of planned gifts. A gift plan that works for one individual or family may not work for another, because the make-up of estates or accumulated assets is as different as the households themselves. The good news is that federal and state law provides the means for donors to direct the taxable portion of their estates to benefit the community and the Church

Some gift planning vehicles will benefit the Church now, giving an immediate tax credit. Others will benefit the Church later, with a tax credit accruing to the donor’s estate.

## SOME OPTIONS...

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### Bequest in your Will

A gift made in your Will – the most common form of deferred gift – provides tax relief to your estate, while ensuring that your commitment to the life of the Church lasts beyond your lifetime. Care should be taken to ensure that the form and purpose of your gift is clear. The St. Mark’s Stewardship Commission can advise on the appropriate wording of a bequest. A lawyer’s services are recommended for the making of a Will.

### Life Insurance

Life Insurance often allows you to make a larger gift than you might otherwise be able to make. You can assign a paid-up policy for which you have no further need, or obtain a new policy, naming the Church as beneficiary.

By assigning ownership to the Church, you receive a tax credit for the cash surrender value and all future premiums.

Naming the Church as your beneficiary will give tax benefits to your estate.

### Gift Annuities

Gift and “Gift Plus” Annuities are another common alternative. They provide guaranteed income during your lifetime and a gift of money to the Church at your death.

### Trusts & Gifts of Residual Interest

Individuals with substantial assets may wish to donate a portion of them to the Church, while retaining use during their lifetimes.

Besides cash and investment holdings, these assets may include property such as real estate or art.

Gift arrangements of this type require very careful planning with professional assistance.

### Gifts of Appreciated Securities

People who have made significant capital gains from investments are often faced with large tax burdens when they sell them. By donating securities to the Church, your charitable objectives can be addressed and your tax burden reduced.

Recent changes in tax law have made this type of gift very attractive to donors.

“Above all, maintain constant love for one another, for love covers a multitude of sins. Be hospitable to one another without complaining.

Like good stewards of the manifold grace of God, serve one another with whatever gift each of you has received.”

1 Peter 4:8-10

