



St. Hubert's Episcopal Church
Kirtland Hills, Ohio

PLANNED GIVING AND THE RIVER SOCIETY

With Parish support and input, the Rector and Vestry have developed a long term Strategic Plan for St. Hubert's. Contained in that Plan is the important element of strong Stewardship; to employ the gifts which God has given us to carry out the mission of St. Hubert's with our time and treasure. In the development of that Stewardship objective, an additional source of financial support has been identified. That additional source is a Planned Giving Program through the establishment of St. Hubert's River Society.

We invite you to join in this endeavor through your prayerful generosity to help support the growth of the River Society in one of the several ways outlined in this brochure.

As St. Hubert's continues its journey as "The little Church with the Big Heart," the scope and health of its ministry has grown through new membership, learning, spiritual development and community outreach. While God always provides us with what we need, it is important that through personal stewardship, the spirit and traditions of St. Hubert's as well as the Church properties and assets are maintained and protected for the present and for future generations through adequate funding.

Over the many years of its history, St. Hubert's has been supported financially in many ways; by means of weekly offerings at each worship service, the Annual Stewardship Campaign, specially directed fund raising such as the recently completed and successful Capital Campaign and other generous gifts which have helped create our Endowment. The River Society adds an important component to Stewardship for the future that will benefit our children, grandchildren and the community we serve.

Daniel Schoonmaker
Rector

Stuart H. Theis
River Society Coordinator



may be achieved as many of us are aware from the multitude of solicitations we receive in the mail from a variety of fine institutions. On the back of this brochure is a representative listing of some of those options. However, while the Vestry will consider any methodology which a donor and his or her financial advisor may suggest, as an initial program objective, the River Society seeks to build membership through two options; 1) To designate a gift to St. Hubert's in a last will and testament or 2) To designate St. Hubert's as a partial or full beneficiary in a life insurance policy. Those options are detailed as follows:

By resolutions adopted June 29, 2009, the Vestry of St. Hubert's has established the River Society to consist of those parishioners and friends who have taken formal steps to designate St. Hubert's as a beneficiary in connection with their estate planning. While a donor may remain anonymous, it is intended to acknowledge donors through the publication of a River Society Annual Report and presentation of a personal membership recognition.

METHODS OF GIVING

Especially if you consider St. Hubert's as family, then perhaps you should consider including St. Hubert's in your estate plan. There are many ways in which Planned Giving

1) Designation of St. Hubert's in Will – St. Hubert's can be made a beneficiary of a will very easily by the addition to any existing will by a simple form called a codicil. This is a very inexpensive process and easy to accomplish for most people. Even for individuals with more complicated estate plans, adding St. Hubert's as an additional beneficiary for a designated amount or percentage should normally be neither expensive nor time consuming. If you do not have a will, it is recommended you do so, and including St. Hubert's with a gift can be a generous gesture as part of that process.

2) St. Hubert's as Life Insurance Beneficiary – Direct contact to the Life Insurance carrier should allow you to obtain the Company's standard "Change of Beneficiary" form. You can designate some portion or all of the proceeds to be donated to the Church. The beneficiary designation should read "St. Hubert's Episcopal Church, Kirtland Hills, OH 44060."

OTHER FORMS OF DONATION

There are many other ways to make a planned gift, including some which provide income for life and can provide significant tax savings. These are often deferred gifts which are made to the parish at the donor's death. Please review a selected list of some of these options on the back page of this brochure and for more information, please contact the Rector or the River Society Coordinator.

DESIGNATED PURPOSES

Planned giving gifts to St. Hubert's will be held in The Church Endowment Fund and be used, with the approval of the Vestry, expenditures or added to the Endowment to support the future well being and ministry of the Church. However, should a donor wish to make a donation for a designated purpose or in memory of someone, they should first contact the Rector or the River Society Coordinator.

LEGAL AND FINANCIAL ADVICE

What ever option and features of a gift which may be chosen, it is always a good idea to discuss the matter and execution of necessary documents with your personal attorney or financial advisor.

- Please notify the Rector or the River Society Coordinator if you have included St. Hubert's in your estate plans through a bequest, life insurance policy or other planned gif.

GETTING STARTED

If you are interested in participating in the River Society, it is recommended that you contact the Rector's Office or the River Society Coordinator. While it is important that you review your decision with your professional advisors, the Coordinator will be happy to assist in obtaining the forms and providing contact information which will help complete the process.

Planned giving is a wonderful way to play a part in the long term success and growth of St. Hubert's, and to help assure that its blessings will be shared with generations to come.

CONTACTS

For more information, contact:

Rev. Dan Schoonmaker – 440/256-1280

Denise Miller – 440/256-1280

Stuart Theis – 440/357-9104

OTHER RESOURCES

The Episcopal Church Foundation provides the following detailed brochures:

“The Ministry of Gift Planning”

“Prepare to Write Your Will”

“Establish a Trust”

“Create a Charitable Gift Annuity”

“Participate in a Pooled Income Fund”

See any of those persons listed above for copies or check:
giving@episcopalfoundation.org

CHOICES FOR PLANNED GIFTS TO THE CHURCH

In planned giving, people make decisions about how they will make charitable gifts in the future – how much and in what form. Arrangements are made currently, but the receipt of the gifts by the church is usually deferred. Some principal planned giving vehicles are briefly described below. Detailed rules apply to each type of gift. You, as the donor, chose which method is best for you.

Bequest in Will or Trust

A provision in a Will or a revocable living trust for a bequest to the church to take effect only upon death (or termination of the trust). The provision can be changed at any time during the donor's lifetime.

Life Insurance

An insurance policy owned by the church on a person's life, or a policy owned by the donor where the parish is a beneficiary is a planned gift taking effect upon the insured's death.

Charitable Gift Annuity

A charitable gift annuity provides guaranteed income for life to you or someone you designate in exchange for your gift. The income is determined by the age of the recipient and the annuity rates in effect at the time of the gift.

Charitable Remainder Annuity Trust

A charitable annuity remainder trust is a transfer of appreciated property to a separate trust, avoiding capital gains tax, which can also provide income for life or a fixed number of years with the remainder value going to the Church.

Gift of Remainder Interest in Residence, Farm or Ranch

With the donor retaining the use of the property for one or more lives, a remainder interest in a principal residence, a vacation residence, a farm or a ranch is deeded to the church.



St. Hubert's Episcopal Church Planned Giving

An Invitation To Join

