

THE HEIRS OF ANNA AND SIMEON



The Heirs of Anna and Simeon is a faithful group of individuals committed to bringing the light of Christ to future generations in the Atlanta community and the world by providing for the life and ministry of St. Bartholomew's Episcopal Church in their estate plans.

These special people have demonstrated their strong desire to see the vital work and presence of St. Bartholomew's continue for generations to come. By extending to them membership in *The Heirs of Anna and Simeon*, the parish acknowledges the generosity of these individuals who have made a commitment to the future of St. Bartholomew's through a planned gift (either on a current or deferred basis). As "Heirs," they have the opportunity to witness to their very important Christian decision to be faithful stewards of their accumulated assets, and, in so doing, will encourage others to do the same. *The Heirs* join together to provide "a light to enlighten the nations," through St. Bartholomew's, long after they have left this mortal life.

THE GIFT OF ONE GENERATION TO THE NEXT

In the spirit of Simeon and Anna we are called to examine how we transfer the wisdom and vision from one generation of followers to the next. While much of this is realized in our life together through our worship, teaching, and other activities as a faithful, caring community, there is much more that can be done to share the "light to enlighten the nations" among all people in our community and the world.


As a means of providing the future financial resources to strengthen ongoing programs and to undertake new ministries, St. Bartholomew's Vestry established The St. Bartholomew's Endowment Fund. In addition, a program is under way for bringing awareness to parishioners about the opportunities and benefits available through "planned gifts." This type of gift involves giving from accumulated assets and usually requires more planning than gifts made by writing a check drawn from current income. Whether small or large, planned gifts normally will be directed to the Endowment Fund and will help to sustain St. Bartholomew's ministries into the indefinite future.

ST. BARTHOLOMEW'S ENDOWMENT FUND

The stewardship of The St. Bartholomew's Endowment Fund is provided by a Board of Directors appointed by the Vestry. It is comprised of seven parishioners, plus the Rector and Senior Warden serving as ex-officio (non-voting) members. The Endowment Fund holds and administers permanent funds, established in perpetuity. Support of ministries occurs through annual expenditures of only a portion of the fund's earnings. The amount that is made available is determined each year by the Endowment Board, as a percentage of the Fund's value. The policy has been established by the Board and the Vestry that endowment fund earnings will be used to develop and enhance ministries and properties beyond what is possible through annual operating monies.

St. Bartholomew's Endowment Fund can receive gifts at any time for its unrestricted funds. Funds restricted to special purposes can be created through larger gifts. In either case, endowment gifts can be made from current income, from assets, or through a "planned gift."

A LIGHT TO ENLIGHTEN THE



HOW TO MAKE A
PLANNED GIFT TO
ST. BARTHOLOMEW'S

Any member of the parish Planned Giving Committee or Endowment Board can assist you in finding the information and resources you may need to explore the possible advantages of making a planned gift. Most planned gifts offer attractive benefits from a tax standpoint. **Some of the most common ways to make planned gifts are listed on the right.**

Gift of Current Assets or Appreciated Securities:

A gift by check may be made outright or pledged over a period of up to five years to The St. Bartholomew's Endowment Fund. Your gift of appreciated securities (stocks, mutual funds, and bonds) held more than one year is exempt from long-term capital gains taxes and, in most cases, enables you to obtain a charitable income tax deduction equal to the market value of the securities.

A Bequest in a Will:

The simple insertion of a clause in your will can assure that a lasting gift will be made to The St. Bartholomew's Endowment Fund. A bequest in a will can take the form of a fixed amount of money, a percentage of an estate or its residual, a specific asset, a trust, or the naming of the church as a contingent beneficiary.

Life Insurance Gift:

Since almost everyone has some kind of life insurance, leaving a gift to The St. Bartholomew's Endowment Fund is a simple way for you to make a difference. You may make a gift with very little cost by asking your insurance professional to help you.

- Change an existing policy to name The St. Bartholomew's Endowment Fund as owner and beneficiary.
- Purchase a new policy and name The St. Bartholomew's Endowment Fund as owner and beneficiary.
- Designate The St. Bartholomew's Endowment Fund as a beneficiary for all or a portion of the policy proceeds.

Revocable Living Trust:

Many people prefer to use a living trust as an alternative to, or in addition to, their will. A clause similar to a will bequest will implement a charitable gift to The St. Bartholomew's Endowment Fund. A revocable living trust allows a gift of assets to be made now while retaining the right to retrieve those assets later if it becomes necessary.

Life Income Gifts:

You can take advantage of a gift vehicle known as a charitable remainder trust to provide income for yourself and your spouse for life, and still make a major gift to The St. Bartholomew's Endowment Fund. These trusts, particularly when they are

funded with appreciated property, often provide donors increased income as well as favorable tax benefits. For gifts in smaller amounts, a **charitable gift annuity** or a **pooled income fund gift** provides similar features and benefits. These three gift vehicles are available through the Episcopal Church Foundation.

Gifts of IRA's and Other Tax Deferred Savings:

Persons with savings in the form of tax-deferred funds such as Individual Retirement Accounts (IRA's), 401(k) plans, or other qualified retirement plans, should seriously consider using these funds for their charitable giving in their estate plans. When individuals are designated as beneficiaries of these funds they are subject to tax as ordinary income; whereas, charitable, tax-exempt organizations are not subject to the income tax and are able to benefit from the full amount. In addition, designating a charity as a beneficiary will take those funds out of one's estate for estate tax purposes. Thus, there can be a significant tax advantages to using these tax-deferred funds for testamentary gifts to charities.

Wording for Gifts:

Gifts to the Endowment Fund may be made using the following designation:

“St. Bartholomew's Episcopal Church, 1790 LaVista Road, Atlanta, Georgia, of the Episcopal Diocese of Atlanta, to be held and administered by the Board of Trustees of the Endowment Fund.”

Memorial Gifts:

A gift can be made through any of the vehicles discussed above and designated to honor the memory of a loved one. To maintain and track the gift as a separate and distinct fund will require the gift to be a certain minimum size, as determined by the policies of the Endowment Board of Trustees.

NOTE: This information is offered for general information only. It is important for those who may consider using one of the gift vehicles mentioned above to seek the advice of their legal and financial advisors.

LIKE ANNA AND SIMEON

When Jesus was presented at the Temple in Jerusalem, Simeon recognized him as the “Consolation of Israel.” An elderly, faithful man, Simeon was promised by God that he would not die before seeing the Messiah. As Simeon held the baby Jesus, he blessed God, proclaiming the words we know well from Luke 2:29-32:

**“Lord, you now have set your servant free
to go in peace as you have promised;
For these eyes of mine have seen the Savior,
whom you have prepared for all the world to see:
A light to enlighten the nations,
and the glory of your people Israel.”**

But the story doesn't end with Simeon's private revelation. As the passage in Luke continues, Anna, an elderly prophet, nurtured the expectation of the Messiah by “worshipping with fasting and prayer night and day” in the temple. Like Simeon, Anna recognized Jesus. She immediately became our faith's first preacher by proclaiming Jesus as Messiah “to all who were looking for the redemption of Jerusalem.” Because of her lifelong faithfulness, her words were heard and believed.

St. Bartholomew's has a fifty year history of proclaiming the Good News to the Atlanta community and beyond through its hospitality, inclusiveness, and its ministries to those on the margins of society. As with Anna and Simeon, each generation of St. Bartholomew's parishioners has worked to keep the light of Christ burning through its witness to the Good News. Now each of us individually can take the step to pass on to future generations the legacy we have inherited by “lighting our light” and becoming members of *The Heirs of Anna and Simeon*.



THE HEIRS OF ANNA AND SIMEON

St. Bartholomew's Episcopal Church

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to go in peace as you have promised;
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whom you have prepared for all the world to see:

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For more information about planning for the future of
St. Bartholomew's, please contact a member of the clergy staff:

ST. BARTHOLOMEW'S EPISCOPAL CHURCH

1790 LAVISTA ROAD

ATLANTA, GEORGIA 30329

404.634.3336



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the legacy we have inherited*

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