

Endowment

... a legacy of faith



As each has received a gift,
employ it for one another,
as good stewards of the
breadth of God's grace.

~ I Peter 4:10

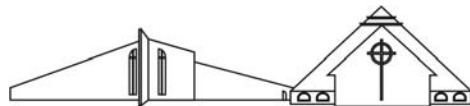
BURNT STORE PRESBYTERIAN CHURCH

Gifts Later...

- Estate Bequests -The bequest is a gift through your will or revocable trust that enables you to retain the asset during your life and provide that all or a percentage, of the asset will pass to the Endowment upon your death.
- Donor Advised Fund - Provides an immediate deduction while allowing you to defer recommendations about the ultimate charitable recipients and the timing of future donations.
- Life Insurance - Naming the Endowment as a beneficiary of a life insurance policy provides a sizable gift at a small cost.
- Payable on Death - Name the Endowment as a beneficiary of a Certificate of Deposit, money market, savings account, or investment account.
- Retirement Plan Assets - Name the Endowment as a percentage beneficiary or a contingent beneficiary of the plan assets can avoid taxation, enabling the assets to pass tax free.

- Legacy Circle: Any gifts made to the Endowment or any pledge of a future gift to the Endowment will qualify the donor for membership in the Legacy Circle. Donors may wish to remain anonymous, if desired.
- For More Information: Contact the church office to learn the current members of the Endowment Committee or contact the committee via endowment@bspconline.org. For Presbyterian Foundation investments contact the PC(USA) Ministry Relations Officer at 855.514.3152.

Consult your attorney or accountant for legal or tax advice. Consult your investment advisor for investment vehicle options or an Endowment Committee member can provide contact information at the PC (USA) Foundation with whom the church partners for gifts in this category.



BURNT STORE
PRESBYTERIAN CHURCH

11330 Burnt Store Road
Punta Gorda, Florida 33955-1402
phone: 941.639.0001 • fax: 941.639.1069
www.bspconline.org • office@bspconline.org



Tear Off Portion of brochure:

Count me interested: Please return this form to the church office or put it in the offering plate..

- I am interested in learning more about making a planned gift to benefit Burnt Store Presbyterian Church Endowment, please contact me.

Giving Heart's Name _____

Email Address _____

Telephone _____ Best time to call: _____

- I have established a planned gift to benefit Burnt Store Presbyterian Church Endowment and by completing this form I wish to inform the church of the type of planned gift and its estimated value.

Burnt Store Presbyterian Church established an Endowment in 2015 as a resource to be used in service to the Kingdom of God. Contributing to the Endowment will help ensure that the church's ministries continue well into the future. Giving enables you to multiply for future generations the God-given resources you have received and provides the means to express special gratitude to God for blessings received.

How does it work? Monies donated to the Endowment are responsibly invested permanently. A portion of the income earned from the Endowment will be used to support church activities and projects, while the accumulated assets continue to grow to preserve the purchasing power of the Endowment for the future.

Who manages the Endowment? The Endowment will be managed by a seven person Endowment Committee consisting of the Head-of-Staff/Pastor, church Treasurer, two Ruling Elders serving on Session and three at-large active members of the congregation appointed by Session based on recommendations of the Nominating Committee, with the assistance of a third-party investment manager selected by the Endowment Committee.

Can contributions be designated? Yes. Four (4) fund designations are currently available:

Rev. Dr. Timothy Stewart Church Legacy Endowment Fund - to support the budget for ministries of the church.

Capital Improvement Endowment Fund - to support capital improvements to the church.

Memorial Garden Endowment Fund - to support the maintenance and improvement of the Memorial Garden.

Mission Endowment Fund - to support the mission activities of the church.

Donors may designate their gifts, in any amount, to one or all of the established Funds.

How does a donation to the endowment affect other giving? It is important to recognize that Endowment giving is separate from annual operating budget donations or other short term designated project donations. Endowment giving is designed to allow the church to accomplish much more than would be possible through annual fundraising efforts alone.

How can anyone participate? The donation options are many...

Gifts Now ...

Cash or Check - Individual gifts can be made at anytime and designated for any of the endowment Funds.

Appreciated Securities - The gift of appreciated securities is most often in the form of common stock or mutual funds. Such a gift can provide tax benefits.

Real Estate - Real estate may be deeded outright. The irrevocable gift of real estate may provide an immediate tax deduction and avoid capital gains.

Charitable IRA Distribution - A giving opportunity for those over 70 ½.

In Honor of a Special Event - Gifts can be made to recognize a wedding, anniversary, loved one's death or other special occasion.

Gifts that Pay Income ...

Pooled Income Fund - A pooled income fund is a charitable trust that pools the gifts of donors for investment. Donors, or persons named by donors, receive a proportional share of the trust's income. After the lifetime of the income recipient, a residual gift amount is withdrawn from the trust to support the designated Presbyterian mission entity selected by the donor.

Charitable Remainder Trust - The remainder trust is an irrevocable gift of assets into a charitable trust that provides you a fixed (Annuity Trust) or variable (Unitrust) income for life or for a set term. At the trust's termination, the trust assets become a generous gift.

Charitable Lead Trust - The lead trust's income payments are distributed to the church for a set period of years, after which the assets are transferred back to the grantor or whomever the grantor has named the beneficiary.

Count me in I am ready to make a gift now. I wish to make an outright gift to the following Endowment Fund:

Rev. Dr. Timothy Stewart Church Legacy Endowment -\$ _____ Mission Endowment -\$ _____

Capital Improvement Endowment -\$ _____ Memorial Garden Endowment -\$ _____

- This gift is to be a
- offered in donor's name(s) _____ gift in honor of _____
- memorial in the name of _____ celebration of special occasion _____
- please keep my gift anonymous