

# Become part of the 1922 Society

The 1922 Society recognizes people who have remembered St. Mark's Episcopal Church through an outright gift of \$500+ or a documented planned gift (in your will or estate plans) to the St. Mark's Episcopal Church Foundation. These funds, when invested, will provide income to help support ministries, missions and capital improvements.

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If you would like to acknowledge the value St. Mark's has had in your life, please consider a gift to the St. Mark's Episcopal Church Foundation.



For more information please contact  
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The information in this publication  
is not intended as legal advice.  
Please consult your attorney or financial  
advisor before finalizing any planned gifts.



st. Mark's  
Episcopal Church  
FOUNDATION

1922 Society



## What is Planned Giving?

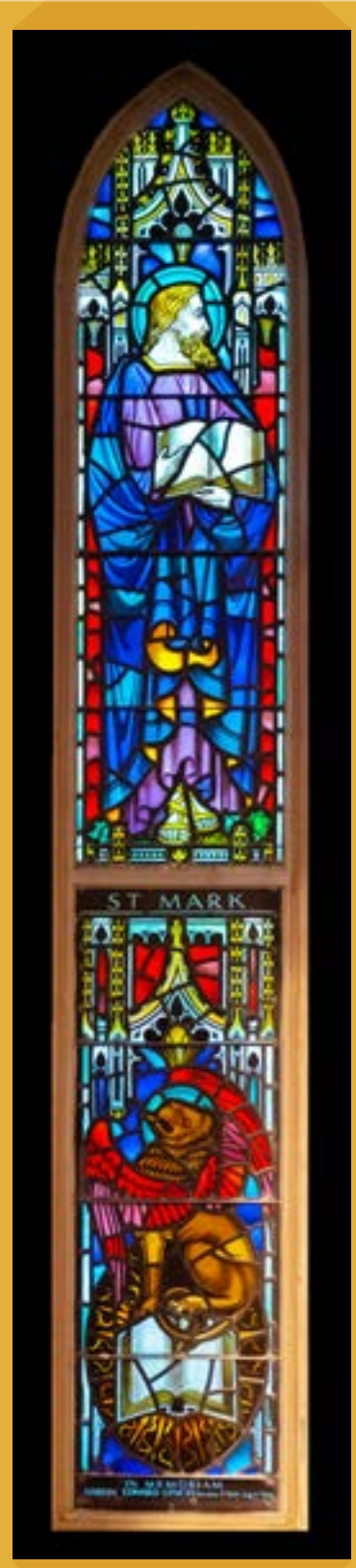
Planned Giving is the transfer of assets to a specific nonprofit organization during a donor's lifetime or upon a donor's passing. Reviewing and implementing future giving plans today can help each of us meet our personal, financial and estate planning goals. Each of us can leave a lasting mark through a gift that provides for the future well-being of St. Mark's Episcopal Church.

### Ways to Give

- ☼ Will or Living Trust
- ☼ Charitable Trusts
- ☼ Retained Life Estate
- ☼ Insurance and Retirement Accounts
- ☼ Qualified Charitable Distribution
- ☼ Outright Gifts

Planned Giving often enables the donor to provide more for his or her heirs and make a larger gift than otherwise possible. It often reduces taxes as well.

In addition to personal financial benefits, a gift to St. Mark's Episcopal Church Foundation is an excellent way to ensure the fiscal stability and successful future of St. Mark's Episcopal Church, and bear witness to the importance of one's Christian Faith.



# Why St. Mark's?

St. Mark's was organized as a parish in 1922 and, over the years, has thrived and grown into a church with more than 1,200 members.

Its rich heritage of longtime generational parishioners is an important legacy to promote and preserve.

Once an outright or deferred gift is made to the St. Mark's Episcopal Church Foundation, donors become members of a treasured group of parishioners known as the 1922 Society. By supporting the Foundation, donors have a meaningful way to ensure their legacy continues into the future. It also provides financial support for the many ministries and missions of the Church, enables good stewardship of our beautiful campus and serves as an inspiration to others to do the same.

Becoming a member of the 1922 Society ensures that the values cherished by our donors, and all members of the Body of Christ, will continue forward.

## WAYS TO GIVE

DEFERRED GIFT

### Will or Living Trust

Donors may include a bequest provision in a will or living trust that sets aside a fixed sum of money, a specific asset, or a percentage of the residual of an estate or living trust for the church. Donors may also name the church as a contingent beneficiary should they be predeceased by the primary beneficiaries.

DEFERRED GIFT

### Charitable Trusts

A Charitable Remainder Trust (CRAT/CRUT) is a form of charitable gift that typically provides donors and/or their designated beneficiary income for life in exchange for the gift. A Charitable Lead Trust (CLAT/CLUT) enables donors to transfer assets to a trust that pays its income to the church for a fixed term of years. At the end of the fixed term, the remaining assets pass to the beneficiary or beneficiaries that the donor names.

DEFERRED GIFT

### Retained Life Estate

Real estate can be the source of a gift to the church. Using a Charitable Life Estate contract, for example, donors can deed a home, vacation home, farm, ranch or condominium to the church and retain the right to live on the property and/or receive income from the property for as long as they live.

DEFERRED GIFT

### Life Insurance and Retirement Accounts

Life insurance is another way to make a meaningful gift to the church. Donors may make the church the owner and beneficiary of a new policy or existing policy. It is also possible to make the church a beneficiary of a retirement account, which can save the donor's family both estate and income taxes.

CURRENT GIFT

### Qualified Charitable Distribution

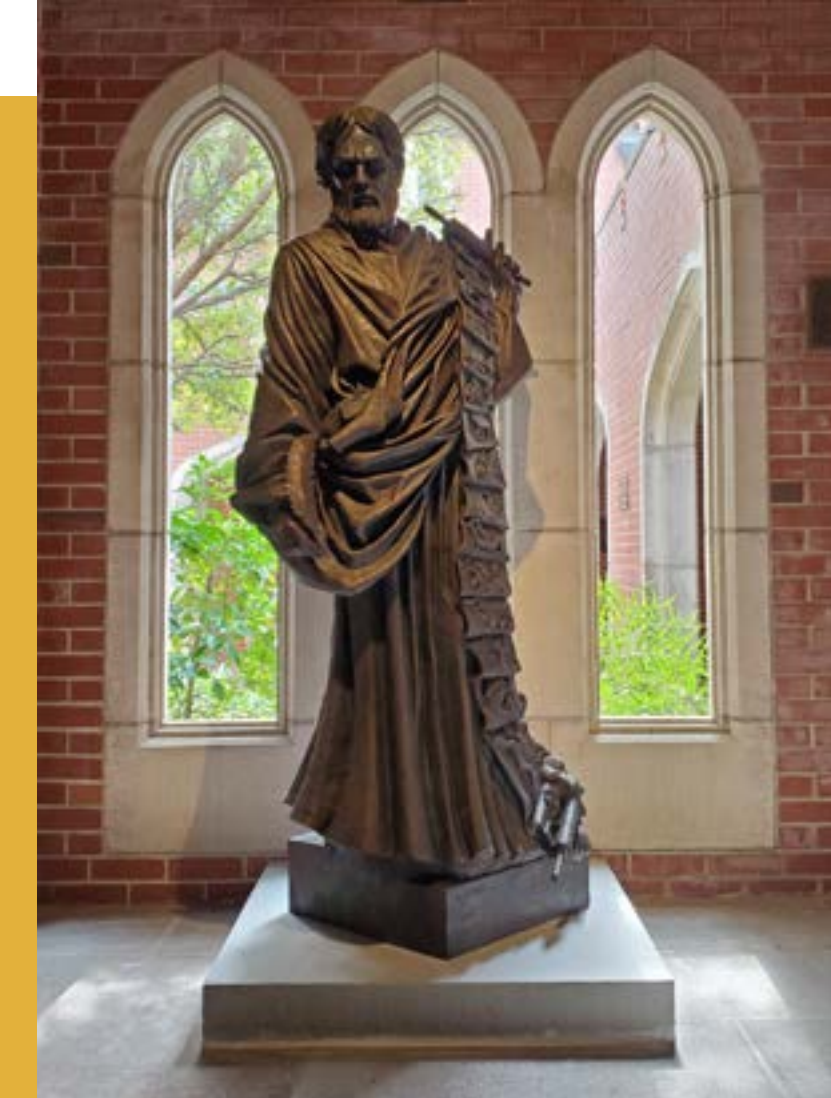
Donors age 70 ½ or older may transfer up to \$100,000 per year from their IRAs directly to the church as a Qualified Charitable Distribution (QCD). In addition, a QCD satisfies all or part of a Required Minimum Distribution (RMD) from a retirement account for those donors that are age 72 or older, thereby decreasing the donor's taxable income by reducing the taxable amount of the RMD.

CURRENT GIFT

### Outright Gift

Donors may make an outright gift now. Outright gifts include cash, securities (stocks and bonds), real estate, tangible personal property, matching gifts, and gifts in kind. Gifts of appreciated assets can be advantageous to donors from a capital gains tax avoidance standpoint. Donors who have set up a Donor Advised Fund (DAF) can make outright grants to the church from their DAF. A DAF allows donors to pre-fund future charitable donations in a single tax year and then spread out their charitable donations over a number of subsequent years. Family foundations are more complex, but offer a similar opportunity.

*Almighty God, whose loving hand has given us all that we possess; grant us grace that we may honor you with our substance, and remembering the account that we must one day give, may be faithful stewards of all your bounty, through Jesus Christ our Lord. Amen.*



## Your gift will support St. Mark's Episcopal Church

When making an outright or deferred gift to the St. Mark's Episcopal Church Foundation, you may choose to support the general endowment for St. Mark's Episcopal Church or direct your gift to a specific fund.

If not directed to a specific fund, undesignated gifts and bequests are directed to the general endowment fund.