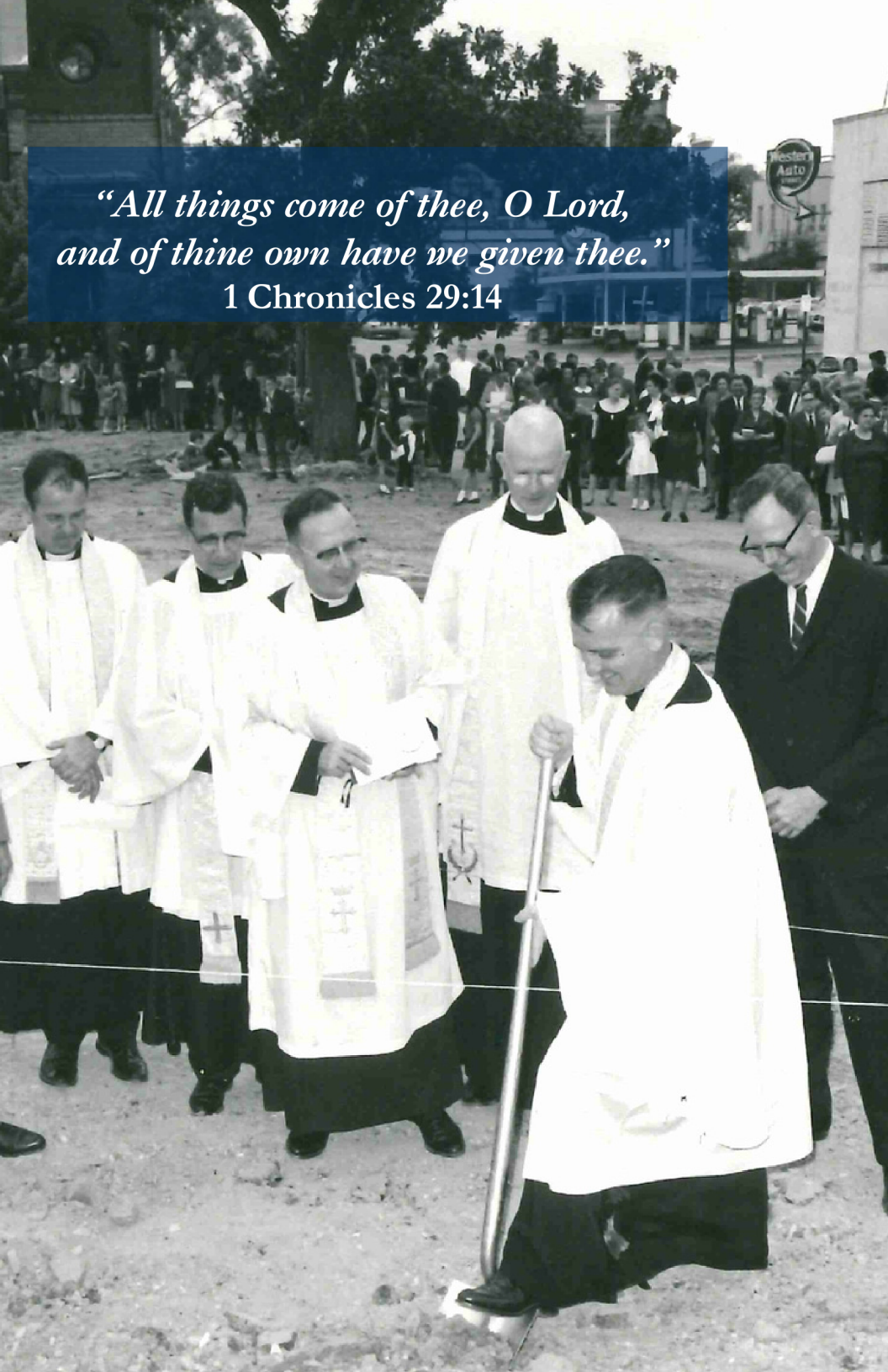


Legacy Giving

SECURING THE FUTURE OF

St. James Episcopal Church



"All things come of thee, O Lord,
and of thine own have we given thee."
1 Chronicles 29:14

St. James Episcopal Church
A Legacy of Vision

In 1844, Margaret Taylor, wife of the twelfth President of the United States, Zachary Taylor, had the vision to gather a group of Episcopalians together to form a new congregation in Baton Rouge. That same year, St. James Church officially organized and received a charter of incorporation from the Louisiana legislature. Then, 50 years later in the Spring of 1895, the members of St. James Church had the vision to construct a new larger church building which remains the church we know and love today. In fact, throughout our history, the members of our parish family have always had the vision to start, sustain, and support the building up of the kingdom of God through the ministries of St. James Church.

You are invited to continue this legacy of vision and be a part of St. James continuing history by leaving a legacy gift to St. James Church.





What is a Legacy Gift?

A legacy gift is a special planned gift or bequest that is realized in the future through careful planning from an individual's estate, will, or charitable trust. Legacy gifts can take many forms and ideas on how to give are shared in this brochure. Most often, planned gifts are earmarked for the general endowment or a specific endowed church fund to support the ongoing ministries of St. James Church in perpetuity. It is your legacy to your church.

All members of the St. James Church family are invited to consider making a legacy gift. All gifts, no matter the type or size, help sustain the future of St. James Church.

Enhancing Our Ministries

The St. James Church endowment took root in 1957 with a $100,000 gift from Juliet Dunbar Knox. In the mid-1960s and early 1970s, the endowment grew to several million dollars through additional bequests. Since these first legacy gifts, the St. James Church endowment has continued to grow while also being carefully maintained for the benefit of future generations. The distributions from these funds follow best practices and are in accordance with the purposes for which the endowment was established.

Today, St. James Church continues to be supported by these legacy gifts. Additional funds from the endowment provide meaningful, needed enhancements to our ministries that are vital. In other words, legacy gifts improve our ability to live out our mission now and into the future.

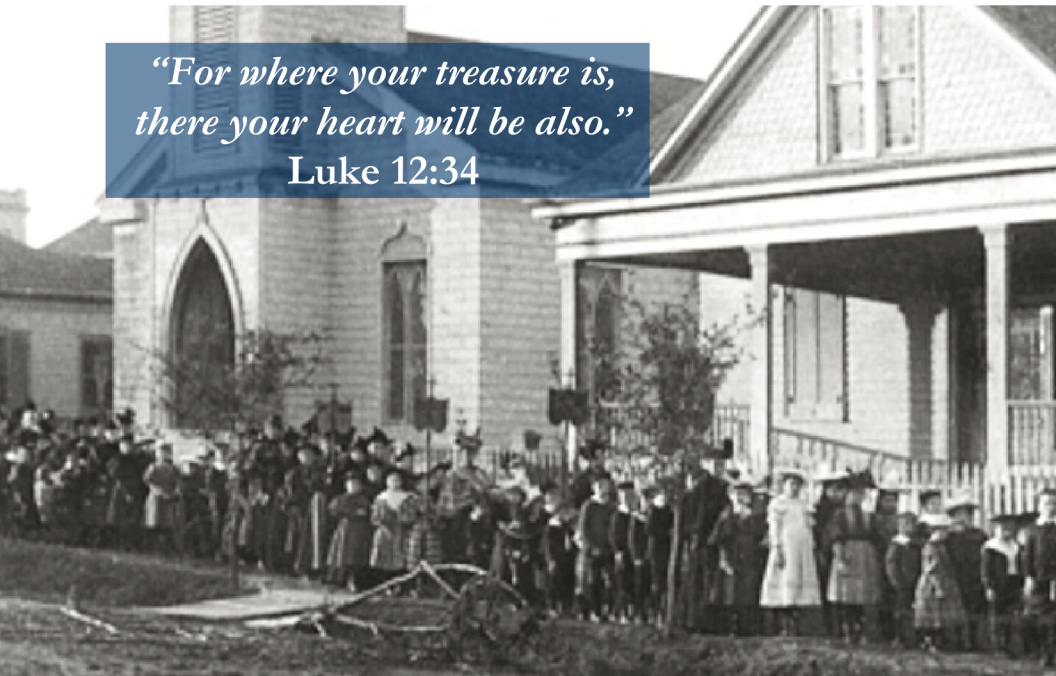


1844 Society

The 1844 Society was established by the Vestry to recognize and celebrate parishioners who have made a bequest or other planned gift from their estate to St James Church. Legacy donors will receive a yearly invitation to a special event and be listed in the Annual Meeting Report, unless your preference is to be listed as anonymous.

To be included in the 1844 Society, please give written notice using the enclosed form confirming your legacy gift is in place. If you have already included St. James in your Legacy Giving, then please let us know using the enclosed form.

Thank you in advance for your generosity and vision. Your gift will help secure the future of St. James Church for generations to come.



"For where your treasure is, there your heart will be also."
Luke 12:34



Ways to Leave a Legacy Gift

There are many ways to leave a legacy gift to St. James Church. It is best to consult an attorney or financial planner to help with your financial plans, explain tax benefits, and set up your planned gift.

Bequests (wills) are an easy way to leave a certain amount of money, a percentage of your estate, or a particular asset, such as an IRA or other tangible item by naming St. James Episcopal Church as a beneficiary, co-beneficiary, or contingent beneficiary.

Securities are stocks donated to St. James Church that have been owned for over a year and thus appreciated. This will save your estate from capital gains tax on the appreciated value. You may also qualify for a charitable income tax deduction equal to the full value of the donated assets.

Ways to Leave a Legacy Gift

Charitable Rollover IRA allows you when you are 70 ½ or older to direct up to $105,000 per year tax-free to St. James Church from your traditional IRA, as part of your minimum required distribution. To qualify, the IRA funds must be directed or transferred directly to St. James Church.

Donor Advised Funds are monies donated to a financial services company (Fidelity/Charles Schwab/Vanguard/area foundation) into a charitable investment account which provides a tax benefit to the donor at the time of deposit and generates yearly income for the designated charity of the donor's choice.

Life Insurance Policies allow you to name St. James Church as the beneficiary or co-beneficiary of your policy. This allows the donor to leave a larger donation than could be made otherwise.





Ways to Leave a Legacy Gift

Charitable Remainder Trusts occur when you donate cash to St. James Church and you receive income generated from these funds during your life. Upon death, St. James Church receives the donated cash for use within the endowment.

Charitable Lead Trust will establish payments to St. James Church for a set period of time. Upon the donor's death, the remainder of the estate will then pass to the donor's children or heirs.

Thank you in advance for your generosity and vision. Your gift will help enhance the future of St. James Church for generations to come.

For more information, please visit the church website at **stjamesbr.org,** call (225) 387-5141, or email **accounting@stjamesbr.org**.

Why We Give

"For Guy and me, our beloved church is the perfect place for us to make a planned gift. Just a simple update to our will was all it took. Now we have the confidence of knowing that even after we are gone, we are still helping St. James Church continue to provide the spiritual community that has been so important to us during our lifetime."

Mimi and Guy Riché





"St. James is at the heart of my family's spiritual life and will have a place in my estate planning. A planned gift makes me feel that I have played an important part in the stability of this special church and that our ministries will endure for those who follow."

Stewart Tharp

Why We Give



"For over 50 years, St. James Church has been our spiritual and community home. What better way to say "thank you" than to include St. James Church in our wills. Our prayers are for a bright future for our church, and we hope that our gift will help others make St. James their spiritual and community home."

Helen and Bill Campbell

"Having a church that can continue to spiritually foster future generations of our family is now one of our priorities. With this in mind, our new estate plan will include St. James Church. This will be in thanks for all the church has given us in the past, and what it will continue to give future generations of our family."

T'lane and Gary Field





ST. JAMES
EPISCOPAL CHURCH

stjamesbr.org/giving
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