

Preserving and protecting the future through Planned
Giving and our Endowment

St. John's Episcopal Church

PRESENTED JUNE 1, 2025 BY OSKAR ABIB, JOHN TREGONING AND RODNEY PAGE

Why St. John's has an endowment:

- An endowment is a restricted fund with assets invested for long-term growth.
- An endowment provides long-term financial security for the church and its missions.
- Endowment funds supplement, but do not replace, annual giving.
- The existence of an endowment enhances stability and expands program opportunities.
- The endowment permits donors to make an investment in the future of the church.
- An endowment is a form of stewardship extending God's blessings to future generations.

Our endowment today:

- Current assets in combined general fund and music fund total approximately \$1.15 million.
 - The endowment is available for transfers to the annual budget, in the discretion of the Vestry and on advice from the Endowment Committee members, of between 3-5% of funds.
 - Professional management of the funds is provided by Brown Advisory, with investments concentrated principally in mutual funds.
 - Current Endowment Committee Members are Rector Josh Walters, Junior Warden Mike Murphy, Zac Merriman (Chair), David Hunt, Owen Jones, Margaret Kerfoot, Gail Kee, John Saunders.
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Examples of ways to give:

- Outright gifts
 - Cash
 - Securities (charitable deduction based on FMV at time of gift, no capital gains)
 - Other (life insurance proceeds; CD's; real estate, etc.)
- Planned gifts
 - Bequests and Wills. Living trusts
 - Donor Advised Funds
 - IRA Qualified Charitable Contributions: if age 70.5 or older; not taxable; counts against RMD

“... for God loves a cheerful giver.”
2 Corinthians 7:9

Planned giving is an act of love.

It is a testament to the values and principles we hold dear.

A crucial aspect of our calling as Christians is the responsibility to care for future generations.

Planned giving allows us to continue the work of God beyond our earthly existence.

Source: The Episcopal Church, Office of Development