

Or, the assets can fund a charitable trust to pay income to your heirs, then principal to the church. (**Note:** It is usually best not to combine charitable and non-charitable beneficiaries on the on the same account.)

If you would like to become a member of The Vine & Branch Society, or if you are interested in including the church in your estate plans, please complete this form and return it to:

*The Episcopal Foundation of
Northern California
1318 27th Street
Sacramento, CA 95816*

I am please to inform you that I have included the church in my estate plan.

_____ You may inform my rector/vicar.

_____ You may publish my name in List of Members.

Name

Address

City, State Zip

Phone

_____ Please send me information about including the church in my estate.

Why Include the Church?

Early in the church's history, Christians began including the church when they planned who would inherit their worldly goods. Through the centuries, Christians have reached out with gifts **great and small** even after their earthly lives have ended, to continue building and strengthening Christ's church and ministering to those in need.

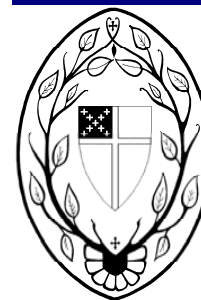
Indeed, the Book of Common Prayer urges parents to make "prudent provision for the well-being of their families," and it urges all persons to "make wills, while they are in health . . . not neglecting, if they are able, to leave bequests for religious and charitable uses." [BCP, Page 445]

If you would like more information, please go to our website www.dncweb.org/foundation

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The Episcopal Foundation of Northern California
1318 27th Street
Sacramento, CA 95816
Toll Free: 800-442-6918 ext. 16
Fax: 916-442-6927
Email: efnc@dncweb.org
Website: <http://www.dncweb.org/foundation>

The Vine and Branch Society



GIFT PLANNING:
HELPING
YOURSELF
AND YOUR CHURCH,
TODAY AND
TOMORROW

7 in a series
Prepared by
The Episcopal Foundation of Northern California
2009



In recognition that all that we are and all that we have comes from God, The Episcopal Foundation of Northern California has organized the Vine & Branch Society.

The Society is open to all who have included the church in their estate plan in some way (i.e., a bequest through a will or living trust; naming the church as beneficiary of a life insurance policy; making a life income gift, etc.)

In organizing The Society, The Foundation intends to provide an opportunity to recognize and thank those who have made a planned gift for Christ's work in the Diocese of Northern California, whether in their home churches, through the Diocese itself, or through one of the diocesan organizations, (i.e., Noel Porter camp and Conference Center; Episcopal Church Women; The Foundation; etc.)

Perhaps more important, The Foundation hopes to provide an opportunity for those who have taken this important step to come together for fellowship to celebrate what has been done to help provide resources for the ministries of tomorrow's church.

Explanation of Membership

While the church is grateful for all gifts bestowed upon it, The Vine & Branch Society was organized specifically to celebrate what church members have done by remembering the church in their estates. (In other words, it is not intended to single out or recognize current giving.) It is the act of including the church in estate plans that is to be celebrated, not the amount. Members' gifts may be small or large, simple bequests or complex trusts. No distinction is made between those who perhaps may be members by virtue of a large gift to a charitable trust and those who may be members because the church is a contingent beneficiary (i.e., the estate is left to the church only if all family members predecease.)

Explanation of Planned Gifts

Bequests—By far the easiest and most popular way to include the church in one's estate plans is a bequest through a will or living trust. This enables you to retain control of the assets throughout your lifetime, while providing a future gift to the church.

Charitable Remainder Trust, Gift Annuity, Pooled Income Fund—These gifts enable you to set aside assets for the church, receive a current income tax deduction, and arrange life income for yourself or a loved one. Such gifts can be especially advantageous when funded with highly appreciated property.

Charitable Lead Trusts— These trusts pay an income to the church for a specific period of time; then, they distribute their assets to heirs. They can provide significant estate tax savings and arrange for young heirs to receive their inheritance when they are more mature.

Life Insurance—You can purchase a new policy, donate an old policy, or simply name your church as beneficiary of an existing policy. If the church is made the owner of the policy, you can receive an income tax deduction.

Gift of House, Vineyard or Farm—You can arrange to give your house, farm, or vineyard to the church; continue to use it for the rest of your life; and receive a significant current income tax deduction.

Retirement Plan Assets—The church can be designated as a beneficiary of an IRA, 401(K), deferred annuity, or similar retirement plan.