



St. Michael's Episcopal Church, 647 Dundee Ave, Barrington IL 60010  
(847) 381-2323 www.stmichaelsbarrington.org

**The St. Michael's Church Legacy Fund  
Planned Giving Program - Intention to Donate Form**

Planned gifts to the St. Michael's Church Legacy Fund help express gratitude for our blessings and enables long-term financial stability for future generations to lead lives filled with God's love and the Holy Spirit. The Legacy Fund recognizes the need to save for the future (like a savings account), unlike the weekly offering plate and pledge donations which support the Church's annual operating expenses (like a checking account). The Legacy Fund receives gifts for endowment purposes, and the principal of this fund is preserved in perpetuity to allow it to grow substantially over the years. To learn more, our Rector and Wardens are available to meet with you.

**Please indicate how you will support our Legacy Fund:**

- Memorial gift in the name of:** \_\_\_\_\_  
*Commonly given in remembrance at the time of death, or on the anniversary of birth or death. Obituaries may indicate "Please consider making a memorial gift to the St. Michael's Church Legacy Fund." Please include the dates of birth and death of your loved one.*
- Honorary gift in the name of:** \_\_\_\_\_  
*Gifts that acknowledge gratitude, recognition or respect during a person's lifetime. Please provide the reason or occasion. Examples include birthdays, anniversaries, retirement, relocations and other special occasion. Invitations may indicate "Please consider donating to the St. Michael's Church Legacy Fund."*
- End of life gift.** *These planned gifts create your personal legacy through your Estate Plan. Inclusion in your Will or Trust ensures that your family, friends and future generations will know that St. Michael's was important to you. Should your financial circumstances change, your gift intention may be increased, decreased or eliminated. It is revocable and not legally binding. We recommend that you provide a copy of this form to your executor and your estate attorney.*
- Tax planning charitable gift or other legacy gift.** *These gifts are for endowment purposes, not for annual operating expenses. We encourage you to consult with your tax advisor.*

**I/we intend to give in the following way(s):**

- Cash/check/debit/credit
- Stocks, Bonds or other investment securities
- IRA or other qualified assets
- Through a Will, Trust or other estate planning document(s)
- Retirement plan beneficiary designation
- All or part of a Required Minimum Distribution ("RMD") of a retirement plan
- Life insurance beneficiary designation
- Real estate or other tangible asset(s)
- Other \_\_\_\_\_

**The expected value of my/our gift is:**

- \$ \_\_\_\_\_  exactly  approximate
- \_\_\_\_\_% of the gift type indicated above
- Undisclosed at this time

**Recognition:** Thank you! All gifts and commitments to give are appreciated and can be recognized on the St. Michael's Church Legacy Fund Appreciation Plaque. Do you wish to be recognized? \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Full Name (printed) \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Full Name (printed) \_\_\_\_\_