



A young man was surprised to find his sick and elderly grandfather planting a small peach tree in his backyard. When the young man asked his grandfather why he was planting the tree, the old man replied, "***Son, all my life I have eaten the fruit from trees that other people have planted. I figure I have an obligation to make sure there is some fruit around for others to enjoy.***"

The Epiphany Catholic Church (ECC) Legacy Society is a new and special way of promoting, recognizing, and honoring planned gifts to our parish.

What is the ECC Legacy Society? Our Legacy Society is for parishioners who wish to remember the parish through their planned giving. Everything is a gift from God. These legacy gifts – like a will or living trust bequest, or other deferred means of giving – provide for the future financial needs of our parish. Members of the Legacy Society give, or make provisions for future giving, to memorialize God's incredible goodness to us. The Legacy Society provides a means to recognize, honor, and thank all who show their gratitude to God in this extraordinary way.

Why consider a legacy gift? As past generations have provided generous financial support over the history of this parish, you have the opportunity to provide a gift to support the parish for generations to come. Since your gift benefits the entire parish, your own family, as part of the community, will also benefit. Thus, your gift indirectly supports your family's continued participation at Epiphany and will be an ongoing source of pride amongst your family members. This will be your legacy! Also, there may be tax and estate planning advantages to making a legacy gift.

How do I become a member? Inform the parish that you've made provisions for the parish to benefit from your generosity in the future by completing the *Enrollment with Statement of Intent* form and return it to the parish. You may also enroll on our website, EpiphanyCatholicChurch.org. A staff member will contact you after your enrollment.

Becoming a member of the Legacy Society means:

- Your family will be remembered each month at a Mass offered for your intentions.
- Society members' names will be listed (unless you choose to remain anonymous) in annual report as a way to honor your generosity and encourage others who may be considering similar acts of generosity. The amount and details of your legacy gift will never be publicly disclosed. Society members may be occasionally recognized in other ways.

Ways to give:

- Make provision in your will or living trust, setting aside a specific amount or percentage of your estate for "Epiphany Catholic Church"
- Make a gift of real estate or other appreciated property (stocks, bonds, etc.)
- Purchase a charitable gift annuity
- Name the parish as a beneficiary of all or a portion of a life insurance policy, IRA or other retirement plan, or charitable remainder or lead trust.

As you consider planned giving to benefit Epiphany, you should consult with a financial planner and/or attorney to discuss your specific situation.

If you have additional questions regarding the Legacy Society, please contact:

Doug Wolz

Parish Manager

doug@ecclou.org

502-780-0673



ENROLLMENT WITH STATEMENT OF INTENT

Completing and submitting this form to the parish office will let the church know that you have made legal arrangements, or are considering making legal arrangements in the future, to include the parish as part of your planned giving and estate planning. Please consider the statements below and mark (x) to those which apply to you.

____ I/ We have already made arrangements to include Epiphany Catholic Church in our Estate Plan or other beneficiary designations as follows:

- ____ Bequest in my/our will or trust
- ____ Beneficiary of my IRA or other retirement account
- ____ Beneficiary of a life insurance policy
- ____ Beneficiary to my life income plan
- ____ Beneficiary of stocks bonds or mutual funds
- ____ Real Estate
- ____ Other: _____

____ Realizing that our gift may encourage others to include Epiphany Catholic Church in their estate plan, I/We agree to give Epiphany Catholic Church permission to include my name in any communications promoting the *Legacy Society*. Neither type of gift nor the amount will ever be publicized.

____ I/ We do not want to be publicly recognized as a member of the *Legacy Society*

Please print name as you wish to be listed or "Anonymous": _____

For long- term planning purposes, the estimated value of my/our gift as of this date is:

\$_____ (If your gift is a percentage of your estate or a specific asset please indicate the approximate current value).

____ I/ We have not yet made arrangements to include Epiphany Catholic Church in our Estate Plan or other Beneficiary Designations and would like more information on how to do so. Please contact me.

Name(s): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Signatures: _____ Date: _____