



The Episcopal Church of the Epiphany

PLANNED GIVING OPTIONS

Gift of current assets or appreciated securities are always appropriate and usually offer favorable tax advantages.

A bequest in a will

The simple insertion of a clause in your will can assure that a lasting gift will be made to The Episcopal Church of the Epiphany. Ask about the exact language you should use to designate the beneficiary you choose.

Life insurance gift

Since many people have some form of life insurance, you may choose this vehicle to make a gift. If you would like to explore this, please ask your insurance professional for assistance.

Revocable living trust

A revocable living trust allows a gift of assets to be made now while retaining the right to retrieve those assets later if it becomes necessary.

Life income gifts

Life income gifts provide income for yourself and your spouse for life, and still provide for a gift to the church after your death. These gifts, particularly when they are funded with appreciated property, often provide donors increased income as well as favorable tax benefits. The three main vehicles are a **charitable gift annuity**, a **pooled income fund gift**, or a **charitable remainder trust**. They are available through the Episcopal Church Foundation and may be used to benefit any Episcopal-related institution.

Gifts of IRA's and other tax-deferred savings

Persons with savings in the form of tax-deferred funds such as Individual Retirement Accounts (IRAs), 401(K) plans, or other qualified retirement plans, may find significant tax advantages in using these assets for their charitable giving in their estate plans. Tax-exempt organizations are not subject to the income tax that individuals are and thus are able to benefit from the full amount of the gift.

Wording of gifts

It is important to use the exact language to name a parish or institution as beneficiary for any form of estate provision. Please see our Suggested Bequest Wording