

## The Whitlock Legacy Society of St. John's Episcopal Church

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*The purpose of the Society is to recognize those who have remembered St. John's in their estate plans, but more so, to enable Society members to witness to the value of St. John's in their lives and to secure its ministries for generations to come.*

### **To Become a Member ...**

You may become a member of the Whitlock Legacy Society simply by notifying the church that you have made a provision in your estate plans for a gift to St. John's Episcopal Church. This may include a bequest in your will, a life income gift (charitable gift annuity, charitable remainder trust, or pooled income fund), a gift of life insurance or another type of planned gift. A gift may be a specific dollar amount or a percentage of an account (e.g. 50% of a life insurance policy with the remaining 50% going to other beneficiaries).

*Neither the size of the gift nor the type of gift matters ..... only that you have made the provision in your estate plans.*

Certain gifts offered during your lifetime, such as cash, securities, or other assets, made directly to the St. John's Episcopal Church Endowment Fund, may qualify you for Society membership (e.g. a transfer from an IRA).

### **As a Member ...**

You become yet another witness in the long line of witnesses beginning with Ambrose Whitlock and his family whose gift of land and material support enabled the church to establish this parish in 1837. Their ministry has left a legacy of stewardship for us to emulate. In addition, you become part of a group of St. John's Episcopal Church members who ...

- meet periodically to discuss the ministries of the church and share a meal;
- sponsor and participate in seminars and special events that share information on the various means of planned giving and issues related to estate planning;
- sponsor a memorial that recognizes these witnesses and reminds the congregation of the importance of being Stewards of God's Bounty.

Below are two different forms available for your use in advising the Planned Giving Committee of:

† your interest in knowing more about planned giving opportunities, or

† your current commitment to make a planned gift to St. John's.

Please send or bring your Enquiry or Enrollment form to the church.

**Whitlock Legacy Society Confidential Enquiry Form**

I/we am/are interested in learning more about how to become a member of the Whitlock Legacy Society at St. John’s Episcopal Church. Please send me/us information on the type(s) of gifts checked below:

- making a bequest in a will
  - making a life income gift
  - making a gift from retirement funds
  - making a gift of life insurance
  - making a gift of a life estate
  - making a gift of appreciate property
- I/we would like to speak with someone confidentially about legacy stewardship.

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Street

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
E-mail / Telephone

Please send or deliver this form to: Planned Giving Committee Chair  
St. John’s Episcopal Church  
PO Box 445  
Crawfordsville, IN 47933

**Whitlock Legacy Society Confidential Enrollment Form**

To the greater glory of God and our Church, I/we have already provided a planned gift for St. John’s Episcopal Church as a beneficiary in my/our will, estate or financial planning. I/we recognize this statement is revocable and is being provided with no specific reference as to the type or amount of the gift.

I/we grant permission to be listed as member(s) of the Whitlock Legacy Society to encourage others to consider a similar act of legacy stewardship. I/we wish our names to appear as: \_\_\_\_\_, or:

I/we prefer to remain anonymous at this time.

\_\_\_\_\_  
Name(s)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
E-mail Address / Telephone

\_\_\_\_\_  
Signature(s) / Date

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St. John’s Episcopal Church  
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