

### ***Charitable gift annuity***

With this option, cash or marketable securities are transferred to the Fund, which contractually guarantees to pay a specified annuity to the donor and/or another beneficiary for life. Upon the death of the last beneficiary, the residual funds go to the Legacy Fund.



These are just some of the ways you can create a legacy through planned giving. If you would like more information, please contact one of the Legacy Fund Committee members or complete the form on the back of this brochure and give it to one of the Legacy Fund Committee members or turn it in to the church office.

### **I'd Like More Information**

Name: \_\_\_\_\_

Address:  
Street \_\_\_\_\_

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

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

- I'd like more information mailed or e-mailed to me.
- I'd like someone to call on me and tell me more about becoming a legacy donor.

# **Legacy Fund**

**Saint Andrew  
Christian Church**



13890 W. 127th Street  
Olathe, Kansas 66062  
913.764-5888  
[www.sacchome.org](http://www.sacchome.org)

## What is the Legacy Fund?

The Legacy Fund (formerly called the Shalom Fund) was originated to provide funds for the needs in our church community. It is funded by members

like you who want to provide a living legacy to support Saint Andrew's mission during your lifetime and beyond. Funds are invested in the Joint Investment Trust of the Church

Foundation, Inc. (Disciples of Christ) in accordance with the terms of the Joint Investment Trust between the foundation and Saint Andrew.

*"It is funded by members like you who want to provide a living legacy to support Saint Andrew's mission during your lifetime and beyond."*

## How is the money used?

Fifty percent of the yearly earned income of the fund is used for outreach missions. The remaining fifty percent is to be used as the Finance Committee and leadership of Saint Andrew recommends. Of that amount, twenty percent may be used to support the church's operating budget, retiring outstanding debt or for maintaining a reserve in the Fund. It is not intended to replace the regular annual giving of the congregation.

## How can I contribute to the Fund?

Funding is usually through planned giving. Planned giving includes:

### *Giving through your will*

You can designate Saint Andrew Christian Church's Legacy Fund as a beneficiary in your will. You may designate a percentage of your estate or a fixed dollar amount to be paid to the Fund, generally after the needs of your

loved ones have been met. If you already have a will, you can ask your attorney to prepare a codicil that names the Legacy Fund as one of the beneficiaries of your estate.



### *Through trusts*

If you have created a living or testamentary trust for your family or others, you can also include a bequest to the Legacy Fund at the termination of the trust. That way, you can provide for your family members and also endow the Legacy Fund without jeopardizing their security.



Through a Charitable Remainder Trust you can irrevocably transfer an asset such as cash, appreciated securities, real estate, etc. to a trustee. The trust can pay income for the lifetime of named beneficiaries for a fixed period. Upon the death of the last beneficiary, the remainder goes to the Legacy Fund.

### *Life Insurance*

If you have a life insurance policy that was intended to benefit your family, but is no longer needed because other assets have replaced that need, you can give the proceeds to the Legacy Fund. Or, you can take out a new policy naming the Legacy Fund as the beneficiary.



### *IRA or other retirement accounts*

Naming the Legacy Fund as the beneficiary of an IRA or other retirement account is another good way to create a planned gift. Bequests of IRAs or other retirement accounts, which are tax deferred, become taxable income to your family or others. This could be a significant amount. Since Saint Andrew is a tax exempt, non-profit organization, 100% of the Fund will benefit the ministry.