

# The Stewards of St. Matthew's

## Purpose

The Stewards of St. Matthew's was established in 2014 to recognize the individuals and families who have included the church in their will or estate plans through a documented planned gift. It enables parishioners to witness to the value of St. Matthew's in their lives and help secure its ministries for generations to come.

## Vision

We give out of our treasure today to bless others who come after us. Planned gifts to our beloved St. Matthew's are acts of hope for the future of our parish. Through God's grace and our giving, St. Matthew's will be well equipped to serve our community as long as time shall last.

## Rewards of Membership

Every year, the names of new members will be recognized in our church communications. All of the Stewards of St. Matthew's will be honored at an annual event and invited to attend other special events as well.

## Becoming a Member

You may become a member of the Stewards of St. Matthew's simply by notifying us that you have named St. Matthew's Episcopal Church a beneficiary in your will or estate plan. You notify us by signing a declaration of intention form to document that you have made a planned gift to the church.



## Ways to Make a Planned Gift

Your planned gift could "endow" any portion of, or all of your annual giving to St. Matthew's. In general, a gift 20 times your annual pledge will continue all of your annual giving in perpetuity. Three easy ways to make a planned gift are described below.

- **RETIREMENT PLANS:** If you have a retirement plan through your employer or your own Individual Retirement Account, 401(k), 402(b) or pension plan, you can make St. Matthew's a beneficiary of the remaining balance by simply contacting your plan administrator. This can be done simply by completing a form identifying the beneficiaries. Many companies provide such forms online or you can contact the plan administrator or company to request one.
- **LIFE INSURANCE/IRA:** You can make St. Matthew's the owner and beneficiary of an existing policy you no longer need. Or you can name St. Matthew's a contingent beneficiary of an existing policy. You can even purchase a new policy and make the church the owner and beneficiary of the policy. This can be done simply by completing a form identifying the beneficiaries. Many companies provide such forms online or you can contact the plan administrator or company to request one.
- **A BEQUEST IN A WILL:** The easiest and most common way of making a planned gift is through a bequest in your will. You may designate any amount of money, a specific asset, or a percentage of your estate. Language for including the church in your will might be: "I give and bequeath (state the amount, asset or percentage of your estate) to St. Matthew's Episcopal Church, 330 North Hubbards Lane, Louisville, KY 40207, to be used (describe use) or as the church's vestry or endowment board deems appropriate."

## Designating Your Planned Gift

Planned gifts are added to the St. Matthew's Endowment, which has been designed to allow you intentional control over your gift. You may select one of the following funds to receive your gift, but you must notify the parish accountant of your wishes in writing during your lifetime in order for your intentions to be fulfilled.

- **GENERAL USE FUND:** Supports the purchase of items necessary to the operation of the parish that may be one-time purchases or expenses that cannot be paid for through the annual operating budget.
- **ASSETS, MEMORIALS & AESTHETICS FUND:** Supports items relating to: (1) the preservation and beauty of the property and grounds, (2) the acquisition of new property, (3) items that enhance the parish buildings, (4) landscape care and remembering those within the Memorial Garden, (5) other related items.
- **PARISH PROGRAM FUND:** Supports programs that enrich the worship, parish life, fellowship, children and youth ministries, education, music, parishioners' ministries and, as appropriate, the community at large.
- **OUTREACH FUND:** Supports ministry and service to people in need within the community and throughout the world with gifts, direct grants, challenge grants, programs developed and sponsored by the parish, and other means.
- **DIMENSIONS OF FAITH FUND:** Supports our ongoing speaker series of thinkers and writers exploring the interface of religion and culture to challenge our minds and renew our spirits.

*NOTE: Anyone may create a new fund in the Endowment and designate the purpose of the fund with a planned gift of \$100,000 or more.*

## Testimonials from Stewards

In the quotes below, two Stewards share why they have included St. Matthew's in their wills.

### **Sara Ceresa**, *member since 2012*

"Our family currently supports the ministries of St. Matthew's with our annual pledge. We have committed to being Stewards of St. Matthew's by listing our church home as a partial beneficiary of our retirement savings. This is an easy way for our survivors to honor our wishes to give St. Matthew's a farewell gift."

### **George Wheeler**, *member since 2008*

"Before joining St. Matthew's, my wife and I were members of St. Francis in the Fields. I have found St. Matthew's to be a more welcoming and inclusive parish, and regard it as my 'church family', serving as a lector and on the home-bound and flower delivery committees. I have included St. Matthew's in my will because it is such an important part of my life and because of its service to the community."



ST. MATTHEW'S  
EPISCOPAL CHURCH

## Response Form

To learn more about joining or to join the Stewards of St. Matthew's, please complete and return the response form below.

- I am/we are interested in learning more about the Stewards of St. Matthew's and planned giving options. Please send me/us information on the following types of planned gifts (check as many as apply):
- Bequest in a will
  - Retirement plans
  - Life insurance
  - Life estate gift
  - Life income gifts
- I/we would like to speak to someone confidentially about legacy stewardship.
- I/we have already made provisions for a planned gift to St. Matthew's as indicated above (please check the appropriate box).

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, ZIP

\_\_\_\_\_  
Email

\_\_\_\_\_  
Telephone

# An invitation to join The Stewards of St. Matthew's



ST. MATTHEW'S EPISCOPAL CHURCH  
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