

Ways to Support the Fund

There are many ways to make a gift to the Fund. The choice of an appropriate gift vehicle usually provides significant tax advantages to the donor. Some of the most common are:

- * Naming St. Catherine's as a beneficiary of your traditional IRA, 401(k) and other retirement account(s).
- * Bequests for loved ones, the church, and others through a provision in the donor's will.
- * A Charitable Gift Annuity or a Charitable Remainder Trust allows a donor to receive income for life while making a major gift to the Fund.
- * An outright gift, which provides an immediate tax deduction (and can be made in honor or memory of a loved one).

“**Inspired by the opportunity to join the Great Oak Society, we have named St. Catherine's as a 10% primary beneficiary of our retirement funds, a simple 20-minute process. Our gift will ultimately make a lasting difference in the life of this community, which has enriched our daughters and our lives in countless and remarkable ways. As our nest egg grows, so too will the size and impact of our gift on St. Catherine's future outreach and capital projects initiatives. We hope our participation will inspire other families to join us.**”

- Phil and Lisa Spessard



An Invitation to Join the Great Oak Society

Members of the Great Oak Society have expressed their commitment to St. Catherine's Episcopal Church by naming the Fund as the ultimate beneficiary of a planned gift. Membership involves no dues or obligations, but it does allow us to thank you and recognize you for the plans you have made, and it may inspire generosity in others.

Great Oak Society members automatically gain membership into The Bishop C. Judson Child Heritage Circle. Through the Circle, the Episcopal Diocese of Atlanta acknowledges people who make a planned gift to a diocesan parish, the diocese, or other Episcopal institutions. Information about the Circle and planned giving generally can be found at the Circle's website:

www.episcopalatlanta.org/Content/Bishop_c.asp

The most important benefit that you will receive from joining the Great Oak Society, however, is the satisfaction derived from making a lasting contribution to the mission and ministries of our church.

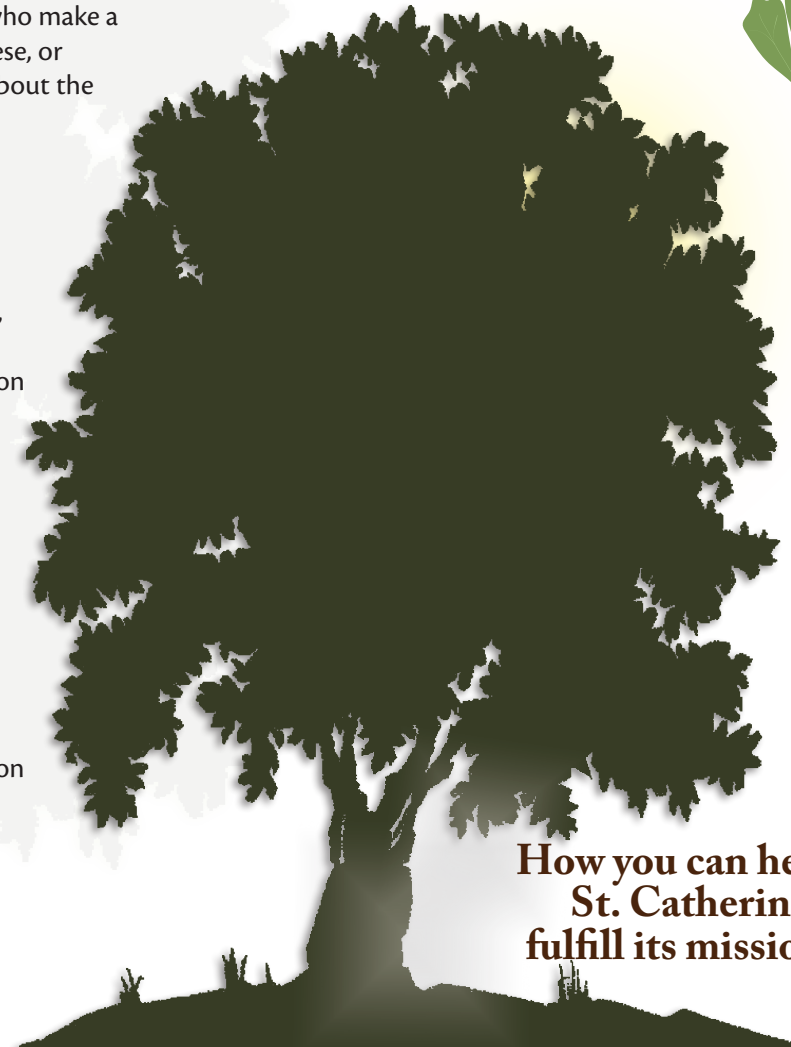
If you would like your gift or bequest to remain confidential, we will certainly respect such requests, but please let us know if you have included St. Catherine's in your plans as we want to make sure your wishes for your legacy are fulfilled.

Information about the Fund's policies and procedures, including the Vestry motion establishing the Fund, is available on St. Catherine's website at:

www.stcatherines.org/greatoakfund

St. Catherine's Episcopal Church of Marietta, Georgia

Great Oak Endowment Fund



How you can help St. Catherine's fulfill its mission.

The Great Oak Endowment Fund

The Great Oak Endowment Fund of St. Catherine's Episcopal Church was established to enable the parish to fulfill its mission more effectively by developing its ministries beyond what is possible through its annual operating funds. Distributions from the Fund will be limited to:

- **Capital needs of the parish**
 - **Outreach ministries and grants**
 - **Seed funding for new ministries and special one-time projects**



The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in good health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses.

Book of Common Prayer, p. 445

Why Establish an Endowment Fund?

Our annual stewardship commitments of time, talent and financial resources ensure St. Catherine's mission within our community and beyond on a daily basis. The Great Oak Endowment Fund provides a legacy to ensure the church's mission for the next 50 years and beyond. Our annual stewardship pledges to the church and our long-term commitments to the Fund both return to God a portion of the abundance we have received, now and in the future. With the former, we pledge from our current income, time and talents, whereas with the latter, we support the church's mission in perpetuity.

By establishing the Fund, the Vestry has planned for the future. Anyone making a gift will know ahead of time the policies and procedures in place to assure good stewardship of the funds entrusted to the parish. The Fund also encourages us to talk amongst ourselves about the kind of legacy we want. Finally, the Fund has an educational purpose to encourage members of St. Catherine's to make a considered choice about the ultimate disposition of their estates.



“Several years ago, when we were planning for retirement, our financial planner showed us how to make deferred gift arrangements that would allow us to establish a lasting legacy for the benefit of St. Catherine's. We did so even though we knew we were moving away from Marietta to be closer to our grandchildren.”

--Liz and John Rea

“Over the years we've updated our wills several times to reflect our changing family--first just us, then the children, and so on. As we thought through the most recent update, we realized that our 'family' was more than just us, the children and grandchildren...we have had the love and support of our St. Catherine's family, from clergy and lay members, for almost 30 years. They have been there for us in happy and frightening times in our lives. We decided to make provision for the continuing health of that community in our wills. We want to help assure that St. Catherine's continues to be there as Christ in the world for future generations as it is for us.”

--Arlyn and Ron Cook