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Planned
Giving

Workbook

Grace United Church

Introduction

Thank you for considering a financial gift to Grace United Church. This workbook is designed to answer your basic questions about planned giving.

In the Donor Menu section, you will find descriptions of Grace United Church's various ministries. Financial gifts are received towards these ministries.

In the Workbook section, you'll find questions to help clarify your intentions as a potential donor. When you meet with our planned giving consultant or your personal lawyer, your answers to these questions will ensure that your donor intentions are properly understood by all parties involved.

Planned Giving

Planned giving is a financial stewardship resource for the Grace United Church community. Our planned giving process uses the expertise and resources of existing foundations to invest and process financial gifts to Grace United.

We have partnered with the *Sarnia Community Foundation*. A planned giving consultant is available from the *Sarnia Community Foundation* to meet with donors to design a plan to match donors' intentions with Grace United Church's ministries and needs.

The *Sarnia Community Foundation* provides a process for designating gifts to Grace United Church. Moreover, The *Sarnia Community Foundation* provides the added option of a donor-directed fund that coordinates the donor's various charitable activities, including Grace United Church. More information about these options is available from the foundation's planned giving consultant.

Our foundation partnerships also ensure that your gifts are managed by qualified professionals who understand charitable trust regulations and practices. Grace United Church's volunteer finance committee and Treasurer are freed of these investment and regulatory considerations.

Additional Options

In addition to using our partner foundation, donors may choose planned giving through an estate, working with a personal lawyer to create a Will. We recommend that you provide your lawyer with a copy of this workbook to help clarify your donor intentions.

Finally, we still welcome donations directly to Grace United Church. Ideally, these are gifts to the General Budget or established special funds, where the donor intent is clear and direct.

If you have any questions, please contact Grace's Treasurer or the Chair of the Finance Committee (through the main office).

Steps to Giving

The planned giving process has three steps for the donor:

Step One:

The donor completes the enclosed Worksheet (pp. 6-8) to clarify donor intentions for designated and undesignated gifts.

Step Two:

The donor meets with a Planned Giving Consultants to discuss any questions about the process and the donor's intentions.

Step Three:

Before deciding on a giving option, the donor should consult a lawyer or financial professional about proposed plans.

Step Four:

The donor may select one or more of the following options for planned giving:

Option A

The donor may give through the *Sarnia Community Foundation*, which will manage principal, investments, interest, and gifts to Grace United Church. The *Sarnia Community Foundation* also allows for the coordination of planned giving to multiple charities.

Option B

The donor may give directly to Grace United Church.

Donor Menu

Grace United Church is organized by the following key ministry areas and support structures. Donors are invited to designate their gifts in one or more areas. Donations may also be undesignated.

Please Note: Donations to the following categories support capital and operating expenses.

Worship Ministry

Your donation to Worship ministries will support current and future worship programs and practices: sanctuary and chapel aesthetics and environment; music ministry; Sunday worship resources; and needs not yet imagined.

Inreach Ministry

Your donation to Inreach ministries will support current and future congregational care and growth programs and practices: pastoral care, newcomers, mid-week and Sunday morning fellowship, small groups, and needs not yet imagined.

Proclamation Ministry

Your donation to proclamation ministries will support current and future special events and community partnerships to witness publicly to the Gospel story.

Teaching Ministry

Your donation to Teaching ministries will support current and future Christian development programs and practices: children and youth, adult education, lay leadership development, print and digital resources, and needs not yet imagined.

Outreach Ministry

Your donation to Outreach ministries will support current and future outreach programs and practices: local, national and international poverty and social justice initiatives, as well as current and potential community partnerships.

Mission and Service Fund

Your donation to the Mission and Service Fund will continue Grace United Church's support for denominational mission and ministry.

Undesignated Donation

Your undesignated donation will support a cross-section of current and future ministry needs as they arise.

Please Note: Donations to the following category supports capital expenses only.

Support Ministry

Your donation to Support ministries will support current and future support ministries, including property needs, communications equipment, capital projects, and needs not yet imagined.

Worksheet

Please complete the following and bring a copy to your meeting with our planned giving consultant or your personal estate lawyer

1. What ministries are important to you? Please check any that apply:

Please Note: Donations to the following categories support capital and operating expenses (see above descriptions).

- Worship Ministry
- Inreach Ministry
- Proclamation Ministry
- Teaching Ministry
- Outreach Ministry
- Mission and Service Fund
- Undesignated Donation

Please Note: Donations to the following category supports capital expenses only (see above description).

- Support Ministry

2. How would you like your donation to be recognized?

Remain anonymous

Honour a memory

Please note: It is our policy not to attach or employ memorial plaques. Donations given in memory of an individual will be recorded in our memorial book and read during the All Saints Sunday service.

3. Have you talked with your family about your planned giving intentions?

Yes No

4. Have you made a list of your assets?

Yes No

5. Do you have a financial plan/estate plan?

Yes No

6. Do you have a will?

Yes No

7. There are a variety of options for leaving a gift. Would you like to discuss any of the following options with the Planning Giving Consultant or your financial advisor and/or lawyer?

- Bequests (General, Specific, Residuary, Contingency)
- Cash or securities
- Life insurance
- RRSPs or RRIFs
- Annuities
- Charitable remainder of trusts
- Residual interest
- A gift in memory of a loved one
- Real estate
- Special occasion giving

8. Are there other questions or options you want to discuss with the Planned Giving Consultant or your financial advisor or lawyer?

Contact Information

Please contact the planned giving consultant at the *Sarnia Community Foundation* to arrange a meeting:

Sarnia Community Foundation

Jane Anema, Executive Director

560 Exmouth Street, Suite 110

Sarnia, ON N7T 5P5

519-332-2588

ed@sarniacommunityfoundation.ca

Please contact Grace United Church with any questions about this booklet or the planned giving process.

Grace United Contacts

Treasurer or

Chair, Finance Committee

c/o Grace United Church

990 Cathcart Blvd,

Sarnia, ON N7S 2H2

(519) 542-1203

Notes
