



PLANNED GIVING at EMMANUEL

Leaving a Legacy

How can you support the Emmanuel you love while still caring for yourself and your family? Through planned giving you can achieve both your family stewardship and your estate planning goals while also supporting Emmanuel into the future. Planned Giving can take many different forms depending on your objectives. And without necessarily contributing money today, supporting Emmanuel into the future can be easy and rewarding.

Ways to support Emmanuel through Planned Giving:

- Will or Trust. Include Emmanuel Episcopal Church in your will or trust for a certain dollar amount; a percentage; a percentage of the remainder; or as a 'contingent beneficiary' if other beneficiaries in your will or trust do not survive you.
- Beneficiary designations on retirement accounts. You can name Emmanuel as a full or partial beneficiary on your IRA or other retirement accounts. Simply contact your financial advisor regarding the beneficiary form.
- Beneficiary designation on a life insurance policy. It's easy to name Emmanuel as a full or partial beneficiary on a life insurance policy. Consult your insurance agent.

Charitable Giving as part of your Estate Plan

Charitable giving as part of our estate planning can be a rewarding process. It is possible to address one's own personal financial objectives, and also have a significant and permanent philanthropic impact on our church and our community.

To get started, and for more information, please contact a member of Emmanuel's finance committee (call Leah at 347-2350) or the Petoskey-Harbor Springs Area Community Foundation (348-5820). Our planned giving guide, *A Permanent Legacy*, can be found here <http://bit.ly/37T7Z9g> or in hard copy at the church office.

A planned gift often takes into consideration tax and estate analysis and introducing other family members to charitable giving decisions. This information is not legal or tax advice. Be sure to seek the advice of properly qualified legal, tax, and financial advisors before making a planned gift.