
What is Legacy Giving?

A Simple Guide for Episcopal congregations

A Faithful Definition

Planned giving is a way of making a charitable gift to the Church from your assets—often as part of your long-term financial or estate plans.

It is an extension of Christian stewardship: a prayerful decision about how the gifts God has entrusted to us can continue to support God’s work beyond our lifetime.

Why It Matters for the Church

Planned gifts help sustain and strengthen the Church for generations to come. They can:

- Support the long-term mission and ministry of the parish
- Provide for worship, formation, and outreach
- Offer stability and vision beyond annual giving

In the Episcopal tradition, this reflects our belief that we are stewards, not owners, of all that we have.

A Spiritual Perspective

Planned giving is not just financial—it is deeply spiritual.

It is:

- An act of gratitude for God’s blessings
 - A witness to hope in the future of the Church
 - A way to live out the Baptismal Covenant
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Common Misunderstandings

“Planned giving is only for the wealthy.”

Not at all. Gifts of any size matter. Many planned gifts are simple and modest, yet deeply meaningful.

“I’ll lose control of my assets.”

Some planned gifts (like a bequest in a will or naming a beneficiary) allow you to retain full control and make changes at any time.

Others—such as certain trusts or irrevocable gifts—do involve giving up some control.

“It’s complicated.”

It can be—but it doesn’t have to be. Many of the most common planned gifts are straightforward and easy to arrange.

The key is this: *there are flexible options, and you can choose what fits your circumstances.*

A Gentle Word About Wills

Many people delay creating a will because it feels complicated—or because they think they need to total up everything they own first.

In reality:

- A simple will is often enough
- You do not need perfect or complete information to begin
- It can be updated as your life changes

Having a will is one of the most important acts of care you can offer your loved ones—and it creates an opportunity to remember the Church in your planning.

What This Can Look Like

Here are a few simple examples of planned gifts:

- Leaving a percentage of your estate to the Church in your will
 - Naming the Church as a beneficiary of a retirement account or life insurance policy
 - Making a gift through a donor-advised fund as part of your legacy plans
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The Simple Truth

Legacy giving is simply:

A way to continue your support of God's work through the Church—now and into the future.

Getting Started

A simple first step might be:

- Reflecting on the role the Church has played in your life
 - Considering the legacy you hope to leave
 - Beginning a conversation with clergy or a trusted advisor
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Important Note

This information is provided for general educational purposes only and is not intended as legal, tax, or financial advice. You are encouraged to consult with your attorney, financial advisor, or other professional when making planned giving decisions.
