

CHRIST CHURCH

GUIDELINES FOR PLANNED GIVING

We at Christ Church believe that bequests and other forms of planned gifts provide a lasting legacy and are among the most important opportunities for stewardship. We therefore urge each member of the congregation to consider a planned gift to the Church, either as part of his or her estate plan or as a direct gift.

We also believe that a vigorous, non-endowed annual Every Member Canvass provides a regular opportunity for each member of the congregation to consider and renew his or her commitment to stewardship and the Church, and is essential to the continuing vitality of the congregation. We therefore encourage parishioners, as they consider planned gifts to the Church, either to leave gifts unrestricted, or to consider gifts for purposes other than to supplement annual operating expenses.

The Christ Church Foundation, which has been in existence for more than fifty years and whose trustees are appointed by the Vestry, presently consists of five funds dedicated to purposes other than support of ongoing operations (Outreach; Habitat for Humanity; Property, Plant and Equipment; Scholarships; and Clergy Housing), and provides a natural vehicle for bequests and other planned gifts.

We urge parishioners considering a planned gift that is restricted to purposes other than those covered by the Foundation's funds to consult with a member of the Clergy or Vestry before such a gift is committed.

Consistent with the foregoing and as a matter of Church policy,

(i) Unrestricted planned gifts to the Foundation will be administered by its Trustees according to the policies of the Foundation.

(ii) Unrestricted planned gifts to the Church itself will be administered by the Vestry. Absent a compelling special need identified by the Vestry, an unrestricted gift to the Church will either be made available to the Foundation, to be administered according to the policies of the Foundation, or designated by the Vestry for a special purpose or purposes that will not supplement annual operating expenses.

(iii) The Vestry and the Foundation Trustees reserve the right to review and consider the terms of all restricted planned gifts and, in the unusual circumstance that the Vestry or the Trustees determine that the restrictions of the gift are not in the best interests of the Church or the Foundation, to decline the gift.

Adopted: February 22, 2010