



**TO: St. James's Episcopal Church and The St. James's Endowment Fund, Incorporated**

**FROM:** \_\_\_\_\_

A. I/we am/are pleased to inform you of my/our legacy gift for the future life and ministry at St. James's, which will be made to the St. James's Endowment Fund, Inc. My/our gift is one of the following:

A bequest by will or a trust distribution naming St. James's Endowment Fund, Inc. as a beneficiary (contingent or otherwise).

Another type of legacy gift as described below — e.g., beneficiary designation of a retirement plan, gift of paid-up life insurance policy, or life income gift.

\_\_\_\_\_  
\_\_\_\_\_

B. The estimated value in today's dollars of my/our legacy gift is  \$

C. I/we would like to be enrolled in the Whitlock Legacy Society, which honors those who have made legacy commitments to St. James's.

I/we give permission for our name(s) to be included in the Whitlock Legacy Society.

I/we would prefer to remain anonymous.

Signature(s): \_\_\_\_\_ DATE: \_\_\_\_\_

Accepted with Gratitude: \_\_\_\_\_ DATE: \_\_\_\_\_

*Please return a signed copy or pdf of this form to:*

*This information will be acknowledged and a signed copy of this form will be returned to you for your files.*

Grace Barrett, Director of Stewardship and Development  
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