



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: _____

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

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

Betsy Lee, Operations and Stewardship Manager
St. James's Episcopal Church
1205 West Franklin Street, Richmond, VA 23220
blee@doers.org