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# Legacy Gift Planning at Annunciation Greek Orthodox Church (AGOC)

Take the next step in faithful stewardship.

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**“The rich are not those who have  
much, but those who give much.”**  
*St. John Chrysostom*

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# 68%

Nearly *two-thirds of Americans* do not have a will.  
Without a valid estate plan, *families can face challenges*  
during the probate process.

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SO...

do *you* have a will or a valid estate plan?

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# What is legacy gift planning?

Legacy gift planning is *the process of arranging future charitable gifts or donations through your estate*. Legacy gifts are made while you're alive and continue posthumously, and may include:

- Anything of value
  - Material goods
  - Property
  - Stocks
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# What are the benefits of legacy gift planning?

## Leave a family legacy

Build a bridge to the future of our growing faith community at AGOC.

Your gift will be felt for generations to come, and will help to expand critical ministries.

## Reflect our faith

Financial stewardship is an essential element of our beliefs as Orthodox Christians.

Our time, talents, and treasures all belong to God, and we are called to give cheerfully.

## Have peace of mind

Being proactive provides a sense of control and peace for you and your family.

Proactive planning of your estate includes your future charitable contributions.

# How will my legacy gift be used?

## Unrestricted

- The needs of the church as decided by the Parish Council
- These expenses can be included in the General Operating Budget

## Leadership Dev.

- Second priest, Youth Minister, Choir Director, etc.
- Assist those pursuing a ministry calling
- Continuing education for staff and lay leaders

## Capital Improvements

- Resourcing new buildings or property, expansion and/or improvement of existing facilities
- This helps to support of new or existing ministries

# How can I leave a legacy gift to AGOC?

## Bequest in a will

- Include a charitable gift for a specific amount, a percentage, or the remainder of your estate

## Life insurance policy

- Name AGOC as the owner or beneficiary of an existing or new life insurance policy

## Retirement, savings, and investments

- Name AGOC as the beneficiary of your IRA, 401(k), Keogh, 403(b), savings or investment accounts

## Real estate

- Donate your residential commercial or undeveloped property



# How can I leave a legacy gift to AGOC? (cont'd)

## Gift in a trust

- Designate AGOC as a beneficiary of a Revocable or Irrevocable Trust

## Charitable Remainder Trust (CRT)

- Place cash, marketable securities, or real estate into a CRT
- Retain income from your property for life or for a specified period of time

## Charitable Lead Trust

- Recurring payments to AGOC for specified period of time
- Reduces or eliminates taxes left to children or grandchildren

## Securities

- Save capital gains tax by giving long-term appreciated securities
- The donor receives a tax deduction for fair market value

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# We're here to help, always.

*Preparing a will is the best way to ensure that your final wishes are carried out, saving your heirs significant time, money and stress.* In addition to your will, consider preparing other important end-of-life such as:

- Power of attorney
- Letter of instruction or intent
- Advance healthcare directive (living will)

As faithful Orthodox Christians, it's critical that living wills reflect our faith.

*Our Legacy Team can provide specific language should be included as your medical and legal team prepare your documents. All conversations are confidential.*

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# What's next?

*Call or email AGOC for more information*

585-244-3377 or [office@agocroc.org](mailto:office@agocroc.org)

*Clarify your intentions*

What kind of legacy would you like to be behind? Who do you trust to carry out your wishes faithfully and responsibly? Document your answers.

*Schedule an appointment with an estate attorney*

The more clarity you have, the better your attorney can serve you.

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**There are so many things  
that that can wait. Your  
future isn't one of them.  
Start planning now.**

**“For us to obtain salvation, we must put our life in order. Because wherever there is order, there is peace; and wherever there is peace, this is where God is found.”**

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***Elder Ephraim of Arizona***

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**Thank you**

