



Invest in the Future of Holy Cross...

Gifts-Memorials-Endowments

Endow Your Pledge

Introduction

Holy Cross is a typical Episcopal Church. In fact, 80% of the Episcopal churches in the US are small congregations, much like Holy Cross. These congregations comprise only 20% of the entire membership of the Episcopal Church USA. The other 20% of the churches are comprised of 80% of the US membership. Holy Cross's key to financial health, much like the majority of Episcopal churches depends, not only on its pledged income and plate offerings, but on extraordinary gifts, memorials and bequeaths as well. Holy Cross currently receives about 14% of its annual operating income from its investments and endowments in the Combined Fund of the Dioceses of Milwaukee. About half of the value of Holy Cross's investment in the Combined Fund originated from various gifts and bequeaths from Holy Cross's members,

In recognition of the need to insure the spiritual, physical and financial future of Holy Cross, the Vestry established the Holy Cross Board of Trustees of Planned Giving and Receiving, and charged them with developing and implementation of policies and plans to receive gifts in support of these goals. The Board with vestry approval has developed two new types of gifts in support of these goals.

Endow Your Pledge

The Endow the Pledge Fund provides a means for donors (members or friends of Holy Cross) to perpetuate their pledge for ever. Each gift to this fund will be invested by the Board in accordance with the Articles of the Holy Cross Endowment Fund. The Articles of this fund state that the gifts received into it will be invested to provide income for Holy Cross's annual operating finances to support the goals mentioned in the introduction, while providing for growth in value to prevent inflationary value erosion, and also to prevent invasion of the original value of the gift. This fund provides a way for members and friends to be spiritually and productively connected to Holy Cross while living or after they have passed.

You may begin to fund your "end of life" gift during your lifetime, over a period of time, making periodical contributions comfortable to you with the understanding that any amounts not funded at your death are fulfilled by an "end of life" gift to make up the difference. You may instruct us to invest all amounts so given, without distribution, until your bequest goal is reached.

These gifts are meant to supplement the church's income now and in the future, NOT TO REPLACE YOUR CURRENT PLEDGE.

Tables of Potential Values

<i>At the Outset</i>		<i>After 15 Years the Original Value Doubles</i>	
<u>Annual Pledge</u>	<u>Gift or Bequest</u>	<u>Value of Bequest in 15 Years</u>	<u>Annual Pledge Payment in 15 Years</u>
25	500	1,000	50
50	1,000	2,000	100
500	10,000	20,000	1,000
1,000	20,000	40,000	2,000
1,500	30,000	60,000	3,000
2,000	40,000	80,000	4,000
2,500	50,000	100,000	5,000
5,000	100,000	200,000	10,000
10,000	200,000	400,000	20,000
25,000	500,000	1,000,000	50,000

Your pledge funded in this manner should increase each year, on average about five percent forever.

Restricted Endowment Gifts to Holy Cross

The Restricted Endowment Fund was created to accept gifts to be used by Holy Cross according to instructions specified by the donor. This might be a sum of money which would produce annual income for a specific purpose, such as outreach, or vestments, or maintenance of the prayer garden. Just as the Endow the Pledge fund this fund will grow to protect the original sums from inflationary devaluation, and to produce sufficient income for the donor's intended use forever.

Getting Started

If you are interested in learning more about how you might endow your pledge or any other gift to Holy Cross please contact Tom Reeder or any member of the Holy Cross Board of Trustees of Giving and Receiving.

All of those participating in the endowment funds will receive annual recognition, or you can choose to remain anonymous during your lifetime or forever. The choice is yours.

If you would like to fund your lifetime contributions to Holy Cross by gifting appreciated securities, we are ready to assist you in facilitating such transfers.

We will provide legal referrals to assist you with documents and advice. Please don't wait until it's too late. Start planning now.

Gifts & Memorials

Gifts and memorials may be in any form, an item for the church, money for a specific use. This is our most familiar method of giving. These gifts are not invested, but typically are used immediately for their intended purpose. They may also be unrestricted in which case the vestry will determine how they will be used.

*The Mission
Planned Giving and Receiving
Board of Trustees*

Develop and provide stewardship of the endowment funds and other programs that will enable members and friends of Holy Cross to support the spiritual, physical and financial future of Holy Cross through planned giving.

Trustees:

Mr. Thomas Reeder, Chair

Ms. Holly Pennington

Dr. Kenneth Stevens

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