

**Enrollment Form Continued**

- I give my permission to list my/our names on the Legacy Circle Scroll of members.

Please print carefully how you wish your name(s) to appear:

\_\_\_\_\_

\_\_\_\_\_

or

- I would rather this gift remain anonymous.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Please return this to your Rector or to:

LEGACY FUNDS  
Diocese of New Westminster  
580—401 W. Georgia Street  
Vancouver, BC V6B 5A1

**I would like information about other gift planning ideas that may benefit me now; or my estate and family in the future:**

- Purchasing a Gift Plus Annuity  
 Gifts of Appreciated Securities  
 Life Insurance Gifts  
 Real Estate & other Gifts in Kind  
 Other: \_\_\_\_\_

**THANK YOU FOR YOUR GIFT AND FOR TAKING THE TIME TO FILL OUT THIS FORM**



**Donor-Advised Funds in the Diocese of New Westminster**

*The Planned Giving Committee supports passionate, faithful leaders who inspire others to give to Christ's Church, glorifying God and improving the world.*



DIOCESE OF  
NEW WESTMINSTER  
ANGLICAN CHURCH OF CANADA

**PURPOSE:**

The purpose of Legacy Funds in the Diocese of New Westminster is to glorify God by expanding His Kingdom and building up the body of Christ. It provides Anglicans with the opportunity to create endowment funds to support eligible Anglican parishes in the diocese, the diocese itself, General Synod and programs of the Anglican Church of Canada; and/or projects, programs and related groups in the diocese as designated by Diocesan Council.

**SETTING UP A FUND:**

A Donor-Advised Fund may be established with a minimum initial gift of \$10,000. Additional gifts of \$1,000 or more may be made either by the donor or others. All gifts to a fund are retained in perpetuity as a permanent endowment administered by the diocese (except a Donor Dispersal Fund—see over). A tax receipt for income tax purposes will be issued to the donor when the gift is received.

**A GOOD FOUNDATION FOR THE FUTURE**

*As for those who are in the present age rich, command them not to be haughty, or to set their hopes on the uncertainty of riches, but rather on God who richly provides us with everything for our enjoyment. They are to do good, to be rich in good works, generous, and ready to share, thus storing up for themselves the treasure of a good foundation for the future, so that they may take hold of the life that really is life.*

*| Timothy 6: 17-19*

Capital is invested in the Consolidated Trust Fund of the Diocese in accordance with the Diocesan Council approved investment policy and managed by our external professional money managers. Detailed accounting records will specifically identify each Fund and allocate income earned to the Fund. Charges for fees and expenses incurred to establish and operate a Fund will be charged to the Fund at the rates established from time to time by the Standing Committee on Administration and Finance and approved by Diocesan Council.

**DISBURSEMENTS:**

Fund income will be disbursed for charitable activities that are consistent with the Fund's purpose. The Diocese will receive recommendations from the donor by February 15 for review by the Diocese's Business Administrator before final approval of the Standing Committee on Administration and Finance. The minimum disbursement permitted is \$250 and will be distributed by March 31. If the Standing Committee on Administration and Finance declines a particular grant recommendation, further consultation will take place with the donor(s) and a new recommendation will be submitted to the Standing Committee on Administration and Finance for approval. Under law, the final disbursement decisions are at the sole discretion of the Diocese.

**FOR MORE INFORMATION PLEASE CONTACT**

Glen Mitchell, CFRE EPC  
Director of Gift Planning  
Diocese of New Westminster  
Anglican Church of Canada  
580 - 401 West Georgia Street  
Vancouver, BC V6B 5A1  
Phone: 604-684-6306 (218)  
Fax: 604-684-7017  
Email: [gmitchell@vancouver.anglican.ca](mailto:gmitchell@vancouver.anglican.ca)

When there are emerging ministries or need, the diocese may present new or urgent options to the donor(s) for their consideration and recommendation.

Appropriate acknowledgement will be given to the Fund for all grants distributed. Annual reports will be sent to the donor(s) showing the Fund's principal, income and disbursements.

### SUCCESSION:

A donor may appoint a successor advisor for the Fund. If the donor's spouse is authorized to give instructions concerning distributions the account may remain open until one year after the spouse's death unless the surviving spouse has authorized a new person, acceptable to the Diocese, to succeed them in giving recommendations concerning annual distributions from the Fund. Upon the death of the donor(s) where no successor is appointed, the fund value will be treated as an "undesignated fund" and be added to the Anglican Initiatives Fund of the Diocese of New Westminster.

### Types of Legacy Funds

In all funds described below the following features are held in common:

- Donor makes an irrevocable gift or gifts
- Donor receives an immediate tax receipt

#### Donor Advised Fund

- Gift is permanently invested, produces income
- Donor is consulted each year on the direction of income to specific program(s) or project(s)
- Diocese reports to and recognizes donor annually
- Consultation may pass to next generation; if not, the fund reverts to AIF

#### Donor Lifetime Fund

- Gift is permanently invested, produces income
- Income dedicated to specific program area
- Donor may change direction during lifetime
- Diocese reports to and recognizes donor annually
- At donor's death, the fund reverts to AIF

#### Donor Dispersal Fund

- Gift is invested and produces income
- Not a permanent fund: Capital is depleted over time
- Donor is consulted each year re income and/or capital to specific program(s) or project(s)
- Diocese reports to and recognizes donor annually
- At death, the remaining capital funds revert to AIF

#### Parish Endowment Fund

- Alternate formal parish endowment fund
- Could be multiple donors over time
- Gifts are invested and produce income
- Capital is permanently endowed
- Income paid annually to designated Parish

#### Related Group Endowment Fund

- Alternative related-group endowment
- Could be multiple donors over time
- Gifts are invested and produce income
- Capital is permanently endowed
- Income paid annually to related group

### Legacy Fund Beneficiaries

The following organizations, agencies, parishes, programs and related groups of the Diocese of New Westminster and the Anglican Church of Canada qualify as donees for the purposes of the Fund.

- 127 Housing Society
- Anglican Appeal
- Anglican Foundation
- Anglican Initiatives Fund
- Anglican Journal
- Camp Artaban Society
- Columbia Coast Mission
- Diocese of New Westminster
- EFM
- Endowment Funds established within the Diocese of New Westminster
- General Synod of the Anglican Church of Canada
- Honouring Our Commitment
- Mission to Seafarer's Society
- Parishes of the Diocese of New Westminster
- Primate's World Relief & Development Fund (PWRDF)
- Sorrento Centre
- South Fraser Community Services Society
- The Coming Home Society
- Vancouver School of Theology

*The Information in this brochure does not constitute legal or financial advice and should not be relied upon as a substitute for professional advice. The Anglican Church of Canada encourages you to seek independent professional legal, estate planning and financial advice before deciding on a course of action.*

### LEGACY FUND REQUEST FORM

*To the greater glory of God and our church, I have provided a legacy gift to one or more of the following:*

- \_\_\_\_\_ **Anglican Church in (city)**\_\_\_\_\_.
- Diocese of New Westminster.**
- The following Anglican institution(s):**
1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

*I have provided for this gift:*

- In my Will**
- In a life insurance policy**
- In a Charitable Gift Annuity**
- In a Charitable Remainder Trust**
- With appreciated securities**
- Other**

\_\_\_\_\_  
*Name*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City/Province/Postal Code*

\_\_\_\_\_  
*Phone*

\_\_\_\_\_  
*EMAIL ADDRESS*

\_\_\_\_\_  
*PARISH*

**Please Turn Over**