



Society of Sowers Disclosure Form
 St. Patrick's Episcopal Church Endowment Fund
 Dunwoody, GA

The Mission of St. Patrick's Endowment Fund is: To provide parishioners with the opportunity to create a legacy by giving St. Patrick's church an enhanced financial capacity for long term ministry.

Date	
Name	
Street Address	
City, State, Zip Code	
Preferred Phone #	
Preferred Email Address	
Signature	

I am pleased to make known my current provisions for supporting the future life and ministry of St. Patrick's Episcopal Church.

What I am giving to: (If a designation is not made, the default placement for the gift will be into the Quasi sub-fund.)

- St. Patrick's Endowment Fund, Quasi sub-fund*¹
- St. Patrick's Endowment Fund, True sub-fund*²

When I am giving:

- Now
- At a later date (mo/day/yr) _____
- Upon my death

What I am giving:

- Cash/Equity/Other Asset in the amount of _____.
- As a beneficiary in my will dated _____ or codicil dated _____.
- As a beneficiary of my life insurance policy.
- As a beneficiary of my retirement plan (e.g., IRA, 401K).
- As a beneficiary of a charitable remainder trust that I have established.
- Income from a charitable lead trust that I have established.
- For a charitable annuity.
- Another manner as indicated below:



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I have enclosed copies of the following pertinent documents for your records: _____

I estimate the value of these contributions to be: _____.

Through this commitment, are you willing to have your name added to the Banner as a member of the Society of Sowers? Yes / No

If yes, check one of the following:

- _____ Name: _____
- _____ Anonymous

With a cash/equity/other asset donation (otherwise known as a "realized" donation), is the donation in honor or memory of someone? Yes / No

- _____ In Honor of: _____
- _____ In Memory of: _____

Are you willing to have your name added to a Plaque when gift is received? Yes / No

Please return to: Endowment Treasurer, c/o Parish Administrator
St. Patrick's Episcopal Church, 4755 North Peachtree Road
Dunwoody Georgia 30338

¹ As explained in the Plan of Operation for the St. Patrick's Episcopal Church (Dunwoody, Georgia) Endowment Fund (the "Plan"), the most recent version of which is available upon request, the principal of a gift to the Quasi endowment sub-fund may be used only when urgent needs or opportunities critical to the mission of the Parish arise, upon the Rector's recommendation and approval of the Vestry and the congregation. Otherwise, it will be treated as a normal endowment and only income from and capital appreciation of the principal is used.

² As explained in the Plan of Operation for the St. Patrick's Episcopal Church (Dunwoody, Georgia) Endowment Fund (the "Plan"), the most recent version of which is available upon request, the principal of a gift to the True endowment sub-fund is kept in the Fund in perpetuity; only income from and capital appreciation of the principal is used.