

St. James' Episcopal Church Planned Giving Vision

Many members of St. James' have made our parish their faith home because of the vitality of our ministries and the beauty of our historic church. Over successive generations, the parish has benefited from parishioners and friends of the church making generous contributions to preserve, expand, and maintain our historic structure, as well as to support the ongoing vitality of our ministries.

The Vestry has established a planned giving program to further the preservation of our historic structure and the ongoing vitality of our ministries. This program will allow for intentional and proper support for the generosity of St. James' parishioners and friends. To facilitate planned giving, St. James' Vestry has established two funds to receive planned gifts to the Church. These funds are distinct from our annual operating budget, which is supported by our Annual Stewardship Pledge Campaign, and which will continue to fund our core operations.

The planned giving program will be administered by a new Planned Giving Committee, which will function as a subcommittee of our Finance Committee. Funds donated will be invested through the Diocese of Virginia Trustees of the Funds (TOTF), and their use will be governed by St. James' Vestry. The TOTF is a not-for-profit, pooled investment vehicle that manages investment funds of the Diocese of Virginia and more than 150 parishes and related organizations throughout the Diocese.

About the Funds

- **St. James' Legacy Fund** – This fund will support the ongoing spiritual vitality of the parish. It is the intention of the Vestry and our Finance and Planned Giving Committees that gifts to this fund will be unrestricted, but we envision the funds being applied to start or substantially expand current and future ministries and strengthen our parish for the long term.
- **St. James' Historic Preservation Fund** – In recognition of our distinguished church buildings situated in the historic district of Leesburg, this fund will support the preservation, modification, and maintenance of our historic property. Maintaining and preserving our historic structures requires significant investment in the years to come. This fund for major historic preservation projects will ensure the structure's strength for generations to come.

While we have established these funds for planned gifts, we would welcome a conversation about leaving a gift to St. James for other purposes.