

There are infinite ways
to express love.

Joining the Oak Circle
is one of them.



Love is what started Christ Church in 1943 and why it thrives today. Love of God, one another and the world. And for this sacred place, which is woven into our lives through christenings, confirmations, weddings, funerals, holidays and holy days. Through the wine and the bread, scripture read, prayers said.

Since the beginning, there has been a desire to ensure that Christ Church lives and loves for generations to come. And so the Oak Circle was created.



Christ Church Charlotte
CHRIST EPISCOPAL CHURCH

1 Corinthians 13

⁴ Love is patient; love is kind; love is not envious or boastful or arrogant ⁵ or rude.

It does not insist on its own way; it is not irritable or resentful; ⁶ it does not rejoice in wrongdoing, but rejoices in the truth.

⁷ It bears all things, believes all things, hopes all things, endures all things.

⁸ Love never ends.

This information is not intended to be tax or legal advice and should not be relied on as such. Please consult with your legal and tax counsel regarding implications of a specific charitable gift.

Christ Episcopal Church
1412 Providence Road, Charlotte, NC 28207
704-333-0378
ChristChurchCharlotte.org

Planned Giving at Christ Church



The Oak Circle honors those who choose to make Christ Church part of their legacy. Planned giving helps ensure that our mission - to love God, care for each other and serve the world in the name of Christ - continues. Planned giving is separate from the annual stewardship campaign, which funds the yearly operating expenses of our parish. Planned gifts may be directed by the donor for a specific use.

Unrestricted legacy gifts will be used with guidance from the Vestry. All gifts to the Christ Church Foundation will be endowed in perpetuity, with investment proceeds used to enhance the good works of Christ Church. The Oak Circle tradition maintains that planned gifts will not be used to supplement annual operating expenses.

If it is in your heart to make a legacy gift to Christ Church, we invite you to become part of the Oak Circle.

Three ways to make a legacy gift to Christ Church

Bequest

The easiest way to make a lasting difference is to remember Christ Church in your will. If you have an existing will, we encourage you to work with your lawyer to prepare a simple, inexpensive codicil. You may bequeath a specific amount or percentage of your estate, providing unrestricted support, benefiting a specific program or investing in the Christ Church Foundation. The bequest can specify a gift of cash, securities, real estate or tangible personal property. For example:

I give (specific dollar amount or asset) to Christ Episcopal Church (EIN 56-0623933) to be used for the unrestricted needs of the parish.

OR

I give (X percent) or (the remainder) of my residual estate to Christ Episcopal Church Foundation, Inc. (EIN 56-6065122) for the purposes of endowment.

Retirement Plan Assets

Often considered an attractive option for making a planned gift, retirement plan assets are among the most tax burdened assets in an estate. To make a charitable gift of retirement assets, simply complete a new beneficiary designation form naming Christ Church or the Foundation as a percentage beneficiary. Please remember to include the following information to ensure accuracy:

Christ Episcopal Church 1412 Providence Road Charlotte, NC 28207 EIN 56-0623933	Christ Episcopal Church Foundation, Inc. 1412 Providence Road Charlotte, NC 28207 EIN 56-6065122
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Life Insurance Policies

You may use one or more whole life insurance policies to make a future gift to Christ Church. To do so, name Christ Church as a percentage beneficiary of a new or existing policy, or simply transfer ownership. As with retirement plan assets, using a life insurance policy to make a charitable gift can be as quick and easy as completing a new beneficiary designation form.

We will be happy to assist you and your professional advisors as you explore planned giving options and can provide sample language for the area you wish to support. This confidential service is available without obligation. If you intend to include Christ Church in your legacy planning or have already done so, please complete a form in the Office of Stewardship so that we may acknowledge your generosity and include you in Oak Circle celebrations.

The Christ Church Foundation

The Christ Church Foundation was founded in 1962 to serve as the permanent endowment for our parish. Nine Trustees, appointed by the Vestry, meet regularly to review the investments of the endowment and to distribute funds. The Christ Church Foundation allocates resources to six specific purposes:

Outreach

Funds are used to support various outreach ministries of Christ Church based on recommendations from the Outreach Commission.

Scholarships

The Christ Church Foundation awards scholarships based on both need and merit to students in college or seminary.

Habitat for Humanity

Established with a dedicated bequest from a Christ Church parishioner and combined with additional parish outreach monies, this fund has enabled Christ Church to build dozens of Habitat homes in the Charlotte area.

Property, Plant and Equipment

This fund is used for specific requests from the Vestry as needed for special projects around the church campus that are unrelated to ordinary operating expenses.

Clergy Housing

The Clergy Housing Fund helps Christ Church attract and keep outstanding clergy, enabling them to live in and become immersed in our parish neighborhoods.

Unrestricted

These monies are used to fund extraordinary opportunities or unforeseen needs of the congregation or the larger community served by Christ Church.

Contributions may also be made to the Foundation in the form of outright gifts and bequests, as well as other non-traditional estate planning devices. Parishioners interested in establishing new funds beyond the six outlined above are encouraged to consult with Christ Church clergy and the Foundation Trustees.