

## Living Legacy Program Overview

The goal of the Living Legacy Program is to strengthen the African Methodist Episcopal Church and its local congregations by building healthy church endowments and by encouraging people around the world to share their gifts with the ministries of the African Methodist Episcopal Church.

## Living Legacy Program: Living Well Today & Tomorrow



Dr. Richard Allen Lewis,  
Chief Financial Officer,  
African Methodist  
Episcopal Church

*“The Living Legacy Program offers excellent opportunities to make a significant planned gift that can benefit any AME Church, ministry or institution for generations.”*

**FOR MORE INFORMATION  
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**The Living Legacy Program  
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### Living Legacy Program

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All Living Legacy Program accounts are held at Schwab Institutional, a division of Charles Schwab. Schwab provides custodial, trading, and record keeping services. The Living Legacy Program is administered by a non-affiliate, third-party vendor, CASI. CASI also serves as the program's financial advisor. For more information: [www.Churchaffinityservices.com](http://www.Churchaffinityservices.com)

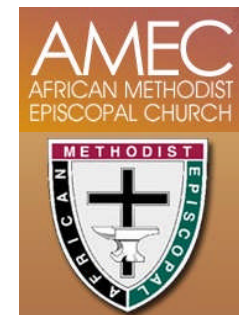


Church Affinity Services Inc.

*Living Legacy Program*  
of the African Methodist  
Episcopal Church  
Finance Office

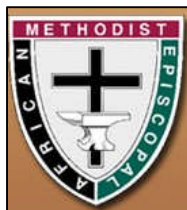


**Program Overview**



### **Living Legacy Program Mission**

Our mission is a call to honor our servants and to celebrate their lives by chronicling their contributions to our Zion. It is also a call to seize economic control of our destiny by investing dollars today to benefit future generations.



### **Living Legacy Program Purpose**

The purpose of the Living Legacy Program is to create a planned giving ministry that fulfills and supports the quadrennial "Living Well" focus of the Council of Bishops. The Living Legacy Program will help strengthen the AME Church and its local congregations by building healthy church endowments and by encouraging people around the world to share their gifts with the ministries of the African Methodist Episcopal Church.

### **Living Legacy Program Goals Are To:**

- track and monitor planned gifts throughout the Church,
- recognize individuals for their gifts and contributions (Living Legacy Wall of Promise and Wall of Life),
- develop a consistent message to donors (Pamphlets, brochures, articles, ect.),
- increase financial literacy around the subject of planned giving,
- offer and recommend services from competent providers.



### **Join The Living Legacy Program Today**

#### **The Wall of Life:**

The Wall of Life recognizes deceased individuals who have made a monetary donation to support any AME Church or ministry with an "endowed" gift. The names, bios and photos of individuals appear in each *Book of Life*. The Wall of Life will be electronic and may be viewed by accessing the AME Church finance website.

#### **The Wall of Promise:**

The Wall of Promise recognizes now those individuals who have made a pledge to support any AME church or ministry with a planned gift. The names, bios and photos of individuals appear in each *Book of Life*. The Wall of Promise will be electronic and may be viewed by accessing the AME Church finance website.



#### **How is someone recognized on the Wall of Life or Wall of Promise?**

- Submit name and photo of the person who has made a gift or pledge;
- Submissions are placed on the Wall of Life or Wall of Promise, [www.ame-churchfinance.com](http://www.ame-churchfinance.com), living legacy tab and in the Book of Promise, published every two years;
- Donor is allowed to designate the AME Church or ministry their endowed gift will support;
- Donor must complete questionnaire and provide proof of his/her pledge.

#### **The Book of Life:**

The Book of Life is a book that contains the names, bios and photos of individuals from each Episcopal District who have made a significant contribution to the Church. The first book will be published in time for the 2008 General Conference.

### **Living Legacy Resources Are Secured:**

Charles Schwab acts as the custodian for all gifts. All checks are made payable to **CHARLES SCHWAB**. The Program's financial advisor invests each gift in a separate account at Charles Schwab for the benefit of the donor's designated AME Church or ministry. Once endowed, the Program's financial advisor distributes a portion of the interest proceeds to the designated AME Church or ministry, annually.



### **Living Legacy Resources Are Protected:**

It is the aim of the Living Legacy program to be transparent. Each donor has the option to receive financial reports from Charles Schwab and access account information on-line. The gifts made to the Program are irrevocable. No one can ever withdraw the money. Every year an independent accounting firm audits the Program's books.

#### **What Is Planned Giving?**

Planned Giving is a form of stewardship for the future. Individuals generally contribute assets they have accumulated during their lifetimes (savings, investments, real estate, retirement plan benefits, life insurance policies, and tangible personal property) rather than giving from annual income (checkbook or cash).



Planned gifts generally are meant to perpetuate something of great value and meaning. A planned gift is the ultimate gift a person can make, both in size and finality. Most often, a planned gift is intended for a permanent endowment fund.