



The St. Matthew Legacy Society

Sample Bequest Language

If you would like to make an unrestricted bequest to St. Matthew Episcopal Church, or to support the parish's programs, your future gift should be directed to "Saint Matthew Episcopal Church in Tacoma, Washington." Its tax ID number is 91-6034631, and its address is 6800 Eastside Dr. NE, Tacoma WA 98422.

Description of amount of bequest: Insert one of the following sentences:

- Specific Amount Bequest: "I give to Saint Matthew Episcopal Church in Tacoma, Washington, a Washington State nonprofit corporation, _____ (insert a dollar amount or description of property)."
- Specific Percentage Bequest: "I give to Saint Matthew Episcopal Church in Tacoma, Washington, a Washington State nonprofit corporation, _____ per cent of my estate."
- Residuary Bequest: "I give to Saint Matthew Episcopal Church in Tacoma, Washington, a Washington State nonprofit corporation, (all or a percentage) of the rest, residue and remainder of my estate."

Description of purpose for which your bequest is to be used:

- Unrestricted (preferable): If you would like the parish to decide how your bequest will be used, insert the following phrase at the end of the appropriate sentence above: "to be used for its general tax-exempt purposes."
- Specific program: If you prefer that your bequest be used for a specific program, insert the following phrase: "to be used to support the ____ program." (It is important to be broad here, to assure that the program still is operating when your bequest matures.)

Endowment or current use?

- You do not need any additional language in your will to leave a bequest for current use.
- If you would like to make a gift to the endowment, add the following sentence: "These funds are to be invested so that only a portion of the income and appreciation is expended annually, in accordance with the policies established by the Vestry of Saint Matthew Episcopal Church." It is especially important to consult with the parish staff if you are considering a designated endowment gift, to ensure that the proposed designation can be honored in perpetuity.

If you include the parish in your will, we would appreciate receiving a copy of the provisions of your will that pertain to St. Matthew Episcopal Church, so that we can acknowledge your bequest intentions and include you as a member of the St. Matthew Legacy Society and the diocesan Bishop's Society.

For more information, please contact Barney Hartley at barneyhartley@yahoo.com.