

Resources for Estate Planning

Please contact Fr. Jason if you have remembered Holy Spirit in your estate planning or would like to learn more.

The Easiest Approach

Generation of a Last Will and Testament

FreeWill.com allows you to create a Last Will and Testament. This service is free because they are trying to support nonprofits to receive bequests. Primarily, they are helping the American Red Cross.

Fr. Jason used this website to create a Last Will and Testament and it took about 8 minutes from start to finish. He is now one more person recorded toward the 50 by 50!

They do make a note that this does not cover pensions and retirement plans which have their own process of designating beneficiaries. Please contact your plan administrator to learn how to designate a percentage of your 401K, 403B, life insurance, or other plans that have their own designees.

FreeWill.com makes it very easy to establish beneficiaries of your general estate and even leave 10% (or more) of your residual estate to the Episcopal Church of the Holy Spirit. You will need the following information for the church.

Episcopal Church of the Holy Spirit
11093 Bandera Road
San Antonio, Texas 78250
EIN # 74-2197710

In your Will, you may designate that the funds go to:

1. The 6676 Fund for Outreach and Evangelism. This fund supports outreach projects, scholarships, and ministries/programs with the purpose of Evangelism.
2. If your bequest is 25,000 or more, you may create your own named endowment with your chosen purpose.

For church-related purposes, Amanda LaHue is a Notary and is willing to notarize documents related to the 50 by 50 Campaign.

Approaches Requiring the Support of Professionals

Other Types of Estate Planning/Planned Giving – These types of planning and giving will require the support of a professional.¹

Irrevocable Planned Gifts	Revocable Planned Gifts
Charitable Gift Annuities*	Estate provisions or bequests
Charitable Remainder Trusts (Uni or Annuity)*	Commitments from Living Trusts
Charitable Lead Trusts**	Life insurance (owned by donor)
Life Insurance	Beneficiary designations
Remainder Interest in Retained Life Estate	Bank or brokerage accounts (Payable on Death, Transfer on Death)
Irrevocable Testamentary Pledges	
Premium Financed Life Insurance	

Community Resource

One question often asked is “How can I make sure Holy Spirit receives funds as long as it is in existence but not beyond the life of the congregation?” One resource in our community is the San Antonio Area Foundation. Please research on your own to make sure this path is right for you. But through the San Antonio Area Foundation, you can set up a fund that names Holy Spirit as its beneficiary until such a time that the congregation no longer exists. Then it can become a grant resource for other Episcopal congregations in San Antonio and your chosen community organizations. Visit <https://saafdn.org/giving/charitable-funds/> to learn more.

¹ <https://www.firstrepublic.com/insights-education/planned-giving-101-how-nonprofits-can-build-maintain-and-enhance-their-programs>