

To become a Legacy Society member, or for additional information, please return this form to the Old Stone Church office in care of the Financial Administrator. Please print:

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

I/we are pleased to become Legacy Society members and, by submitting this form, I/we declare that I/we have included the Old Stone Church or the First Presbyterian Society in my/our will or have made another deferred gift to one of those entities.

I/we wish to be recognized by the Legacy Society : Yes _____ Anonymous _____

Signature: _____



How to Become a Legacy Society Member

There are a number of ways to participate in the Legacy Society. The best gifts are tailor-made to fit each donor's needs and giving intent, and will help you realize your giving legacy.

Appreciated Securities—These are transfers of stocks or mutual funds, which are made directly from your brokerage account to the Old Stone Church or the First Presbyterian Society.

Beneficiary Designations—Donors may make a significant deferred gift to the church by designating the Old Stone Church or the First Presbyterian Society as a beneficiary of a life insurance policy or retirement plan. There are many ways to give through these instruments, some of which may have benefits to donors.

Bequest in Your Will—Giving a fixed amount (or item such as property) or a percentage of your estate is an easy way to include the Old Stone Church or the First Presbyterian Society in your estate planning. You may even donate a residual amount left in the estate after all other bequests are granted.

Personal Property—Personal property, such as automobiles, works of art, antiques, coin or stamp collections, jewelry, and other items may also be given.

Life Income Plans—Life income plans, such as charitable gift annuities and charitable remainder trusts, may be set up to benefit the Old Stone Church or the First Presbyterian Society. Donors receive charitable deductions when the gift is made, and income from the trust throughout their lifetime. The remainder goes to the designated beneficiary upon the passing of the donor.

This publication is provided for general gift-giving information only. The Legacy Society, the Old Stone Church, and the First Presbyterian Society in Cleveland are not engaged in rendering legal or tax advisory services. State laws govern wills, trusts, estates, and charitable gifts made through a contractual agreement. For additional assistance, please engage the services of an attorney, accountant, or other professional advisor.

What is the Legacy Society?

- The Legacy Society was established to provide a means for members and friends of the Old Stone Church and the First Presbyterian Society in Cleveland to assure the perpetuation of these historical institutions through financial or other tangible commitments, primarily of a deferred nature.
- Membership in the Legacy Society is open to anyone who acknowledges that they have made a bequest in their will or estate or other tangible deferred gift to the Old Stone Church or the First Presbyterian Society.
- A description of specific bequest amounts need not be included in one's membership application.
- Legacy Society members may be recognized from time to time for their deferred giving support of the Old Stone Church or First Presbyterian Society, unless they wish to be anonymous.
- If you have already named the Old Stone Church or the First Presbyterian Society in your will or other financial instrument, please complete the application so that you may be enrolled as a Legacy Society member.



Photos by Ted Wetzler

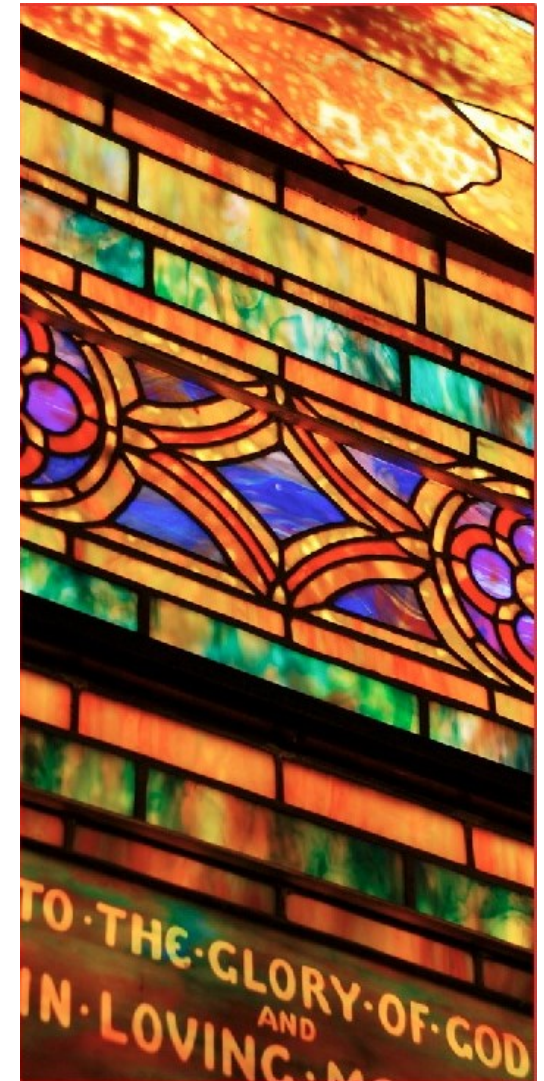


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The Old Stone Church

Legacy Society



A Tribute That Will Last