

“OH, NOT ME!”

There is a comic strip that appears now and then depicting a conversation between what appears to be a very prosperous businessman and another character who is in the estate planning field. The latter asks the other, “Could I interest you in some estate planning?” The former replies, “Oh, not me. I’m afraid I am not a very good candidate. I have a small patch of lawn I mow myself and two window boxes I lost interest in two years ago.”

If you are a member of the “Oh, not me” chorus, perhaps you should rethink your answer. In recent years we have experienced the roller coaster ride of the investment world, the tragedy of 9/11, the scandal of Enron, the fall of Saddam Hussein, and the continuing war in Iraq. This has put many people in the position of needing to have a will to ensure that their wishes are carried out. Even if you are sure that your estate is small, a will can give you important peace of mind.

Over time, those of us who have listened have learned the lesson that estate planning is about control: control of how our assets and possessions are distributed after we no longer need them. Some of us have made wills that are the flow charts that help make sure things go where we want them to go. Some of us, perhaps even a higher percentage, have not made wills, thinking that our estates aren’t big enough to warrant the expense or stubbornly avoiding facing up to the fact of our own mortality. If we don’t have wills, we are ceding control to Uncle Sam and our state government and counting on them to do what we want. If that’s what you’re thinking, think again!

Perhaps even more important than the control a will gives us over the distribution of our possessions, is the opportunity it provides for us to demonstrate what values and what institutions we revere. By making a charitable bequest, regardless of its size, to our church or any worthy organization, we have the chance to make a statement about ourselves and create a legacy—a commitment that helps our family and friends understand what we valued most in life. A legacy is a creative way of ensuring that even when we are gone, we will not be forgotten.

Over the years, many thoughtful individuals have included bequests to our church in their wills. These have ranged in size from a few hundred to many thousands of dollars. Each one is important for each honors a loyal member of our parish and helps to ensure that our church can continue to serve God and His world. If you would like information about how to include a bequest to your church or any other charity in your estate plan, contact a Planned Giving committee member or the Episcopal Church Foundation at (800) 697-2858, www.episcopalfoundation.org, for confidential advice.