



The Power of Your Bequest

*The Most Lasting Gift
You Will Ever Give*



For almost 1000 years the Equestrian Order has been committed to acts of mercy in the Holy Land...we are literally the lifeblood to Christians there. After Spiritual growth, it is our highest calling. When you consider your lasting calling and the legacy you want to leave in this world, please consider the power of a bequest on our brethren in the Holy Land.

The Power of Your Bequest

Your lifetime gifts to the Order have been used to form Priests and Religious, support local Parishes, educate school children, help those who are sick, disabled and displaced, champion justice, encourage economic development, seek peace, and ultimately provide a path of hope for Christians in the Holy Land.

Estate giving is the one time in your life that you are free from considering your personal needs to ensure your own well-being. You have a unique opportunity with an Estate bequest to continue your pattern of support for the wonderful and necessary programs and people who rely on the Order for help. Estate funds would be available after your lifetime needs have been satisfied, it can reduce or eliminate Estate Tax liability and it may provide some tax benefits while you are alive.

We ask that you please consider including the Order among your beneficiaries. Please remember even a small portion of your estate can have a dramatic effect on those in the Holy Land. No gift is too small to matter. With compounding and long-term growth, even a modest bequest can grow to make a profound impact on opportunities and conditions for our brethren.

Those Who Have Given

The Gernert and Zuberano estates gave gifts, including land, which the Order sold and funded a multi-million dollar endowment for education in the Holy Land. That endowment has funded 18 scholarships at Bethlehem University every year...for years!

Father William Harnishfeger, a noted Cardiologist, upon his passing gave a simple percentage of his estate. That bequest, setup many years ago, will provide over \$1M for the general efforts of the Order with a portion for the needs of handicapped children in Bethlehem and a hospital in a very poor part of Jordan.

HOW DO I GIVE A GIFT?

The most common way to give a gift through your estate is through a “bequest” included in your will or trust. A statement in your will or trust should specify WHO is going to receive the funds and WHAT they are going to receive. You have the options of giving 1) a stated amount, 2) a percentage of your remaining assets or 3) a specific item or items of value. The most common form is as an UNRESTRICTED gift- one where the Order receives the funds with the flexibility of applying them to programs and projects most in need. In your document, make sure you identify the recipient as:

THE SOUTHWESTERN USA LIEUTENANCY OF THE EQUESTRIAN ORDER OF THE HOLY SEPULCHRE OF JERUSALEM

WHAT IF I WANT TO GIVE IT FOR A SPECIFIC PROGRAM OR PROJECT?

We realize that although a general gift gives the Order the most flexibility in helping Christians in the Holy Land, you may have a passion for specific projects or areas of focus within that broad scope. Such gifts are often known as restricted or directed gifts in which your estate clearly specifies for which purpose you want the funds used. We must be careful that the specific use is broad enough to be viable for a long time. Currently the focus is on Education, Health Care or Religious support.

The Lieutenancy is sensitive to your desires to help specific groups or categories of people in the Holy Land. We also realize that the Order has a very extensive knowledge and support system for the projects and programs most needed. It is our goal to find a good fit between your desires to help and programs highly valued and needed in the Holy Land. There is also the reality of evolving needs where good intentions included in your estate may no longer be needs after your passing.

If you have a more specific desire, then there are two things you need to do. **FIRST:** Within the bequest you should have broader language much to the effect that if the specific action is no longer possible you would like the funds to focus on one of the three areas above or for the general use of the Order.

SECOND: It is critical to contact the Lieutenancy to discuss your specific desire to determine if it is appropriate and aligns with Order’s vision.



WHAT IF I WANT MY GIFT TO HELP FOR AN EXTENDED TIME OR FOREVER?

When you want your funds to support the Order for an extended period of time either in general or for a specific application then you would want to create an ENDOWMENT. There is some flexibility in the types of endowment including options of a specific percentage or amount distributed each year or an endowment where only the interest from the funds is

used for the Order's programs, thus protecting the principal in perpetuity. These parameters will determine the amount and duration of your gift. Your estate planner can help you with your desire. As you plan an Endowment please consider discussing it with your heirs and educating them on your vision for the Endowment.

Fortunately, the Order can manage such Endowments once you specify them. Upon your passing the funds would be transferred to the Order who will implement your gift as you choose. Likewise, if you would like to keep your heirs informed about the impact of your Endowment in the future, please discuss this with the Lieutenantcy to form a mutual plan.

WHAT TYPES OF ITEMS CAN I GIVE?

The Southwestern Lieutenantcy is very flexible and open to receiving a wide range of valuable items to fund the Order. Of course Currency, Stocks and Bonds are welcome. But in addition, real estate and other items of value including real property, collections, or pieces of art are readily accepted. If you are not sure, please contact the Southwestern Lieutenantcy for clarification.

SPECIAL BENEFICIARY OPTIONS

In addition, there are assets where you can name the Order as the beneficiary such as Life Insurance Policies and Retirement Plans. Many times these have long since been funded and it is simply a matter of redirecting the beneficiary to being the Order.

ARE THERE TAX BENEFICIAL GIVING OPTIONS?

There are a number of tax beneficial options for giving. For example, giving highly appreciated stock or other assets provides your estate a way to avoid taxes. There are other more complex options, which your estate planner can guide you through. More sophisticated options include a variety of Charitable Trusts. These by their nature give you the option of donating an asset for which you get a current tax deduction. You then receive proceeds over time (much like an annuity) and then the balance is given to the Charity at a later date. Or you can take an asset you are no longer using (land, insurance, etc.) and donate it for which you could receive an annuity over time while the charity eventually uses the bulk of the proceeds.



Please remember, this is NOT a comprehensive estate planning handbook and is NOT a substitute for involving your estate planner. This merely is an overview of options, and, with your estate planner's skill in developing proper plans, we are confident your wishes can be realized.

We asked Lady Nancy Iredale who has already included the Order in her estate about her reasons - *"My EOHSJ bequest permits me to continue to support Christianity in the Holy Land after I can no longer make an annual contribution."*

WHAT SHOULD I DO TODAY?

Create or Update your Will and Trust –You should give direction of where you want your treasures to go upon your passing, usually in the form of a Will and/or a Trust. Otherwise, the State will decide how your estate will be divided and to whom. **SUPRISINGLY , today over 70% of us have not yet completed either a Will or Trust.** You have been meaning to, haven't gotten around to it...others haven't thought about or reviewed theirs in years. We ask that you either complete or review yours, since none of us know the hour of our calling. This is actually the best gift you can give to your children and those people and projects you care about. It makes it possible for you to realize your wishes and to help the people you care about without involving the government in your final gifts.

Finally, please consider the Order in your estate plans.

Another special member, who wishes to remain anonymous, continues to be very generous in her lifetime but also has made a bequest to the Order and when asked why stated - "Because I take my vow and commitment to supporting the Order very seriously, it made sense for me to endow the Order through my Trust and Will so that I could continue in my commitment. I trust those individuals in the Order who give their talents to the Church and I trust them to do the right thing with it. They are some of the finest people I know and I trust them to fulfill my intentions."

Legacy Society Estate Bequest Appreciation Program

We cherish every gift you give either now or in the future. If you choose to include the Order in your will or trust, please let us know. We wish to express our appreciation and make others aware.

All members who include the Order in their Estate will be recognized as follows:

- Recognition on their Annual Meeting Name Tag*
- Recognition at the Annual Business Meeting*
- Recognition at their Mid-Year Meeting*
- It will be noted next to their name in the Annual Roster*
- It will be noted in the Year in Review document*
- Upon a member's passing the Lieutenant will speak to the impact of a member's gift*



Thank you for remembering the Christians of the Holy Land in your estate planning. If you would like more information or would like to make us aware of your commitment to the Order please contact the Southwestern Lieutenancy either by phone or e-mail. If you have special desires please contact Lieutenant@eohssouthwest.com to discuss your desires and ensure it is appropriate and within the power of the Lieutenancy and the Order. When you inform us of your commitment please include a copy of the bequest page of your will or trust and appropriate contact information (estate planner, lawyer, heirs, etc.)

If you have further general questions, you may contact Lady Erin Donovan, an Estate planning specialist in Tulsa, Oklahoma at 918-747-3788. She would be happy to discuss your thoughts and plan with you. You also can contact the Lieutenancy office with questions.