

# Become a Member

A person is invited to become a member of the Hō'ike Ulu Legacy Society when a provision is made through a bequest or planned gift to any congregation or ministry, or to the Episcopal Diocese of Hawai'i. To be recognized as a member, please complete the following:

■ A congregation, the Diocese or ministry is remembered in my/our will or estate plan. Please enroll me/us in the Hō'ike Ulu Legacy Society.

■ Congregation or ministry remembered:

■ Please send additional information about the best way to remember a congregation or ministry in my/our will or estate plan.

■ I/We request a confidential consultation with the Bishop.

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Fax, e-mail or mail this completed form to:

**The Rt. Rev. Robert L. Fitzpatrick**

The Episcopal Diocese of Hawai'i

229 Queen Emma Square, Honolulu, HI 96813

Fax: (808) 538-7194

E-mail: [rlfitzpatrick@episcopalhawaii.org](mailto:rlfitzpatrick@episcopalhawaii.org)

As Christians, we begin and end our lives in grace as part of a faith community. We celebrate and struggle together, encourage each other, and in our times as a community, learn about God's love and mercy. Here, within our faith family, we can consider our own mortality and the legacy we would like to leave at the end of our lives. Bequests and other planned gifts enable us to continue our stewardship of God's gifts and to make estate plans that express our faith in the One who has created, redeemed, and sustained us.

As a member of the Hō'ike Ulu Legacy Society, you will be part of a committed community of Episcopalians—stewards who have remembered their congregations, the Diocese, or a ministry in their wills or estate plans.

Your planned gift may be the largest gift you have the opportunity to make. Your gift, in combination with those of others, can do wonders and make a permanent difference in the funding of an important ministry.

*Ahahui Makana  
Ho'oilina o  
Le Ho'ike Ulu*



**HŌ'IKE ULU  
LEGACY  
SOCIETY**  
The Episcopal Diocese of Hawai'i



*"I came that they may have life and  
have it abundantly."*

John 10:10



*Some of the Maui Legacy members  
with diocesan leadership*

**THE EPISCOPAL DIOCESE OF HAWAII'I**  
229 Queen Emma Square, Honolulu, HI 96813  
(808) 536-7776 | [www.episcopalhawaii.org](http://www.episcopalhawaii.org)

## Purpose

**Honor the Past** ~ We uphold in grateful memory those faithful and generous stewards of the past whose gifts and bequests to our churches and Diocese have created a strong Episcopal presence in Hawai'i today.

**Witness for the Present** ~ We invite all Episcopalians in Hawai'i to join these stewards of the past, witnessing to God's grace in their lives through a planned gift or bequest of their own, benefiting their local congregations or the Episcopal Diocese of Hawai'i.

**Cultivate the Future** ~ We commit ourselves to planting today the seeds of faith that will bear fruit beyond our lifetimes, supporting the future ministries of our churches and Diocese, and sustaining their vitality in witnessing to the love and grace of God through Jesus Christ.

## Benefits

Most active Christians have given regularly of God's gifts to further God's Kingdom during their lifetimes. Membership in the Hō'ike Ulu Legacy Society represents the desire of concerned Christians to continue this stewardship after death by making a planned gift. These gifts represent our grateful response to God's goodness and mercy to the world, as well as our desire to participate in the future of Episcopal ministries in Hawai'i.

## How to Make a Planned Gift

**Planned gifts usually provide significant tax advantages to the donor. Some of the most common options are:**

**Gift in Life** ~ A gift of cash securities or other assets, such as objects of value and real estate.

**Bequest** ~ After providing for loved ones, a provision in the donor's will can be made to the church and others. A gift of 10% of one's estate, for example, creates a perpetual tithe to the church.

**Life Insurance** ~ Allows a large gift at a small cost by designating the congregation, ministry, or Diocese as beneficiary of a new or existing policy. There are also many other ways to use life insurance to make a planned gift.

**Life Income Gifts** ~ Allows a donor to receive income for life while making a major gift to a congregation or the Diocese. A number of customized options are available through the Episcopal Church Foundation, such as Charitable Remainder Trusts, Pooled Income Funds, and Charitable Gift Annuities.

**Retirement Funds** ~ Provides an opportunity to give resources such as an IRA, 401(k), 403(b), etc. directly to a congregation, ministry, or the Diocese.

**Other Gifts** ~ There are many other kinds of gifts that can be made, making you a member of the Hō'ike Ulu Legacy Society. Contact your financial advisor for more options.

## Gifts to Diocesan Ministries

**Donors may also choose from among many diocesan ministries in developing planned gifts and bequests, including but not limited to:**

**Episcopate Endowment Fund** ~ Gifts to this fund will help support the cost of the Bishop's ministry.

**The Chang Clergy Children's Scholarship Fund** ~ Provides scholarship grants to children of clergy who are in the Episcopal Diocese of Hawai'i.

**Seminarian and Curacy Fund** ~ Provides funding for the costs of seminary and one or two years of internship ("curacy") for members of this Diocese who are pursuing a call to ordained ministry.

**Repair and Renovation Fund** ~ Provides funding for those congregations that cannot afford the cost of maintaining their physical resources. Funds can be made available as grants or low-interest loans.

**Edwin Lani and Puanani Hanchett Memorial Mission Fund** ~ A capital fund to support the mission of the Church in the Diocese of Hawai'i.

**In addition, any diocesan ministry welcomes planned gifts or bequests to further its mission.**