

If you already qualify for membership in the Heritage Society, or would like information on joining, please fill out this form.

- I would like to learn more about the Heritage Society. Please contact me

I may qualify as a member of the Heritage Society because I have made a gift through:

- A direct contribution to the St. Peter Congregation Endowment Fund.
- A bequest in my will.
- Naming the St. Peter Congregation Endowment Fund as a beneficiary of a trust, my life insurance policy or IRA
- Other _____

Name _____

Address _____

City, State, Zip _____

Telephone _____

E-mail _____

All information will be kept confidential.

We would be pleased to provide you, your attorney, or financial advisor with additional information. As this brochure is general in nature, you should contact your own professional financial advisor to learn how this general information relates to your individual circumstances.

Our Mission

We the members of St. Peter Parish, Slinger, Wisconsin, as a true Christian Community, under the guidance of the Holy Spirit, resolve to make our parish a center of spiritual growth and renewal.

We dedicate ourselves to the call of the Mission of the Church by providing Catholic education, formation and moral guidance, based on the gospel, for all the people of our community.

We accept the challenge to live a Christian life!
We celebrate our relationship with God through Liturgy, Sacraments and Prayer.

As a faith-filled community, we promise to be caring and supportive of our brothers and sisters in Christ, who may be hurting spiritually, physically, emotionally, or financially.

To foster a just and peaceful society, each member, with his or her talents, time, and treasure, will contribute to the good and growth of our entire Parish.

May the Holy Spirit bless our efforts to form a faithful, trusting, and loving community.

Whatever you have - has been given.
Whatever you give - will be returned

ST. PETER CONGREGATION ENDOWMENT FUND & HERITAGE SOCIETY

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Slinger, Wisconsin 53086
Phone: 262.644.8083
Fax: 262.644.7951
www.stpeterslinger.org

St. Peter Parish

Endowment Fund
Heritage Society



Imagine what can happen with a little faith and inspiration, a few seeds to get things started, watering and cultivation by many hands. **Do more than just imagine!** Try your hand at getting those seeds sown!

In our ever-changing world we find that there are few constants that bring us together. Amidst great change St. Peter Parish has stood out for its strong history and celebration of the core values of faith, hope, charity, honesty, respect, and responsibility. These are the constants that have allowed St. Peter Parish to meet the increasingly diverse needs of our Catholic Christian Community through many years of service and dedication.

Every day St. Peter Parish works to create a place where children and adults, and individuals and families, will grow to be happy, healthy, holy, productive, and disciplined members of our community. St. Peter Parish continually improves its school and religious formation programs and services to especially nurture our young people who will become tomorrow's parish and community leaders.



What is the Endowment Fund?

The St. Peter Congregation Endowment Fund provides a financial vehicle for receiving and managing charitable contributions to our parish. The Fund was established by visionary members of our parish who wanted to be certain that any and all gifts made to St. Peter Parish would benefit our parish for generations to come.

How is the Fund administered?

An Endowment Fund Committee comprised of parish members acts as an advisory committee to our parish priest and trustees regarding day-to-day activities of the St. Peter Congregation Endowment Fund. Final decisions regarding disbursements of the interest of the Fund are made by the parish priest and trustees.

How will the Fund be managed?

The Fund is managed by a local investment firm and is monitored by our parish priest and the president of our Endowment Fund Committee.

When will income be disbursed?

Under normal circumstances, only the interest from the principal of the Endowment Fund will be used. The principal of the Fund shall be used only in unusual circumstances, and requires unanimous action by the parish directors. Interest from invested contributions to the Endowment Fund will be used to support and assist St. Peter Congregation in its mission by providing supplemental funding of programs and services, and by providing additional support for its operation, maintenance, capital requirements, and continued existence. The interest from the invested funds will help finance programs participants can enjoy today. The principal goes forward into tomorrow. 100% of your contribution will benefit St. Peter Parish Programs.

How can gifts be made to the Fund?

- Make an outright gift of money, securities, property, or other marketable assets to the Endowment Fund.
- Create a charitable remainder trust, or name the St. Peter Congregation Endowment Fund as a beneficiary of a new or existing life insurance policy, or annuity, or retirement account.
- Name the St. Peter Congregation Endowment Fund as a remainder beneficiary, to receive a specific bequest in a will or distribution from a living trust.

It is important to note that any amount you wish to contribute to the Endowment Fund, no matter how great or small, will be accepted with great appreciation.

The Heritage Society

Recognizing Gifts to St. Peter Endowment Fund

The heritage of a Catholic Christian Community is what one generation passes to the next - our shared history and customs, the lessons we teach and the values we share.

The St. Peter Heritage Society is a group of people who have made specific gifts to the Endowment Fund, ensuring that St. Peter Parish will continue to be a positive force in this community for many years to come. Earnings from invested contributions to the Endowment Fund will be used to support and assist St. Peter Congregation in its mission by providing supplemental funding of programs and services, and by providing additional support for its operation, maintenance, capital requirements, and continued existence. The interest from invested funds will help finance programs participants can enjoy today. **The principal goes forward into tomorrow.**

Your contribution to the Endowment Fund is the strongest statement you can make in support of St. Peter Parish and School. You may qualify for membership in the Heritage Society by:

Giving is an act of the heart. You may give without loving, but you cannot love without giving.

An accumulation of monetary gifts that together equal \$2,500 or more or naming the St. Peter Congregation Endowment Fund as a beneficiary for \$10,000 or more qualifies you for membership in the Heritage Society.

Benefits of Heritage Society Membership

- An invitation to an annual dinner where you meet like minded donors and learn how your contribution is making a difference in your parish and parish school.
- Opportunities to attend seminars where you can remain up-to-date on financial and estate planning.
- The knowledge you are helping the people in your parish community grow in faith and love in both heart and mind.
- Knowing full well that your most cherished gifts will benefit your parish and parish school for generations to come.

