

I/we have remembered my/our congregation, the Diocese, or another ministry in my/our will or estate plan. Please enroll me/us in the **Hō'ike Ulu Society**.

Parish or ministry remembered:

\_\_\_\_\_

I/we would like further information about the best way to remember my/our congregation or other ministry in my/our will or estate plan.

I/we would like a confidential consultation with the Planned Giving Officer.

Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Please give this to your priest, or fax/mail to:  
**Planned Giving Commission**

*Attn: Diocesan Treasurer*

The Episcopal Diocese of Hawai'i

229 Queen Emma Square

Honolulu, Hawai'i 96813

Fax: (808) 538-7194



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 our estate plan that expresses our faith in the One who has created, redeemed and sustained us.

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

Your planned gift may be the largest gift you have ever had 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 Ka Hō'ike Ulu*

## **HŌ'IKE ULU LEGACY SOCIETY OF THE EPISCOPAL DIOCESE OF HAWAI'I**

*Past Witness  
Sustaining the Vision*



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

*John 10:10*



**The Episcopal Diocese of Hawai'i**

229 Queen Emma Square

Honolulu, HI 96813

(808) 536-7776

[www.EpiscopalHawaii.org](http://www.EpiscopalHawaii.org)

## PURPOSE OF THE HŌ'IKE ULU SOCIETY

- **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 Hawai'i Episcopalians 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 seeds of faith that will bear fruit beyond our lifetime, 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 OF THE HŌ'IKE ULU SOCIETY

Most active Christians have given regularly of God's gifts to further God's Kingdom during their lifetimes. Membership in the **Hō'ike Ulu Society** represents the desire of concerned Christians to continue this stewardship after their death through 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 choices 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, 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 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 one's parish or the Diocese. A number of customized options are available through the Episcopal Church Foundation such as Charitable Remainder Trusts; Pooled Income Fund and Charitable Gift Annuities.
- **Retirement Funds**—Provide an opportunity to give resources such as IRAs, 401Ks, 403Bs, etc. directly to the congregation, ministry, or the Diocese. If left to loved ones, these funds may be subject to high income and estate taxes.
- **Other Kinds of Gifts**—There are many other kinds of gifts that can be made, making you a member of the **Hō'ike Ulu Society**. Contact a member of the Planned Giving Commission or 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 existing fund will help with the cost of the bishop's staff; this will reduce assessments on the congregations.
  - **Bishop Scholarship for Clergy Children Fund**—Provides scholarship grants for children of clergy serving 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 called to ordained ministry.
  - **Repair and Renovation Fund**—Provides funding for our congregations that cannot afford the cost of maintaining our physical resources. Funds can be made available as grants or as low-interest loans.
- In addition, any Diocesan ministry welcomes planned gifts or bequests to further their mission.*

## HOW TO BECOME A MEMBER

A person is invited to become a member of the **Hō'ike Ulu Society** when he or she makes a provision through a bequest or planned gift to any congregation or ministry or to the Episcopal Diocese of Hawai'i.