

Epworth Planned Giving & Endowment (PG&E)

September 2020

Updated Information

- Current endowment total \$141,592.00
- Consists of \$95,000.00 in donations and \$46,592.00 in stock appreciation, dividends and interest. (Since March 2017)
- Each year we donate 5% of the endowment total to the Finance Committee General Fund and this year's check is \$7,079.00. (Total over \$18,000 to date)
- The fund is invested in a Vanguard Socially Responsible S&P 500 account. No alcohol, tobacco or firearms. Top stocks are Apple, Microsoft, Amazon, Facebook and Alphabet (Google).
- The Epworth Legacy Society consists of all those who have given or promised a gift in the future. Currently 47 members. Over \$2,000,000 has been promised.
- To become a Legacy Society member contact Darlene Ford in the church office and fill out a nonbinding form. (302) 227-7743 ext. 122
- For help with estate planning, wills, trust accounts, contact our attorney Cindy Szabo at (302) 841-6020.
- For help with tax planning, charitable contributions, consulting, contact our accountant Matt Dickens at (302) 856-4141.

PG&E committee: Reverend Dr. Vicki Gordy-Stith, Darlene Ford, David Streit, Miriam Barton, Janet Yarbrough, Barbara Kurtz, Bob Paulen, Karen West, Jeanne Jerfsten, Lauren Stayton, Cindy Szabo, Matt Dickens, Dennis St. Germain.