

LEGACY PLANNING COMMITTEE ANNUAL REPORT

At the May, 2011 regular meeting of the Vestry, I presented a draft set of steps and an associated timeline for the formation of All Saints' Legacy Planning program (formerly known as Planned Giving). The Vestry expressed enthusiastic support and offered suggestions regarding parishioners who would be ideal candidates to form our Legacy Planning Committee and complete initial tasks. During the June, 2011 Vestry meeting, the Vestry approved the following slate of names as committee members:

Larry Rosenfeld (Memorial Fund Trustee subject matter expert)
Don Rathbone (member at large)
Meadow Platt (member at large)
Keith Packer (committee chair)

Over the summer months, the committee met several times to develop and refine documents intended to describe All Saints' Legacy Planning Program and the processes required to create, maintain and nurture this important function. This set of draft documents is now ready for review, comment and approval by the Rector and Vestry. It is our goal to complete this approval process during the first half of 2012 and proceed forward with the requisite steps to formally establish and launch the program.

I am grateful for the willingness, dedication and hard work of every committee member. Although we have much work ahead, this group has done an outstanding job to lay a foundation that will serve our parish well. I also have much gratitude for the leadership provided by the Rector and Vestry. The pastoral and spiritual guidance provided by these individuals have played a key role in establishing an approach and tone regarding legacy planning that captures the spirit of this parish that we all love.

Respectfully submitted,

Keith Packer