The St. James By-The-Sea Legacy Society Enrollment Form

The St. James By-The-Sea Legacy Society
honors individuals who make an investment in
the future ministry of St. James By-The-Sea by including the parish in their estate plans.

I accept the invitation to join fellow supporters of St. James By-The-Sea, La Jolla, California, in becoming a member of **The St. James By-The-Sea Legacy Society.**

Name:_____

Address:_____

On the roll of the society, I wish my name to appear

as: _____

Signed:_____ Date:_____

[ ] I consent for my name to appear with others on the public roster of the Society.
[ ] I do not wish my name to appear with others on the public roster of the Society.

CONFIDENTIAL

1. I have included St. James By-The-Sea in my estate plan by means of
   [ ] Bequest in the will [ ] Beneficiary of revocable trust
   [ ] Beneficiary of IRA/401(k)/403(b)/variable annuity/fixed annuity
   [ ] Charitable Gift Annuity
   [ ] Remainder beneficiary of irrevocable trust (CRT, etc.)
   This beneficiary designation is [ ] revocable [ ] irrevocable
   [ ] Beneficiary of life insurance policy
   [ ] Remainder interest in residence/real estate
   [ ] Other: _____

2. St. James position as beneficiary in this plan is: [ ] Primary [ ] Contingent

3. The current value of the gift is approximately: $_____.
   [ ] I do not know the value.
   [ ] I do not wish to disclose the value.

Please return this form to the Rev. Julie Christian; or to the chairs of the Planned Giving Committee, Ralph Dilley and Nancy Kaehr; or to the parish treasurer, Chris Christopher, Jr. in an envelope marked, "PERSONAL AND CONFIDENTIAL."

Thank you very much!
Your planned gift to St. James By-the-Sea will be a blessing to many