



ST. PETER'S GENERAL ENDOWMENT FUND

SPRING 2021

WHAT IS THE ST PETER'S GENERAL ENDOWMENT FUND?

- The starting vision for the St. Peter's General Endowment Fund was to build financial capability over time through the receipt of unrestricted gifts from the St. Peter's community to provide financial support as and when needed and for as long as practical for the continuation of the work of St. Peter's-on-the-Rock; the objective being to ensure St. Peter's has the financial capability to reach it's 200th anniversary.

HOW IS THE FUND MANAGED?

- The fund is internally restricted, under the control of the Wardens. The fund is directly managed by RBC Dominion Securities. A St Peter's Endowment Fund Oversight Committee, consisting of three voting members chosen by the Wardens, provides advice and guidance to the Wardens relative to all aspects of the establishment and operation of the Endowment Fund.

WHAT IS THE CURRENT STATUS OF THE FUND?

- Significant gifts from the Wotherspoon and Watson families, augmented by other giving and a buoyant market, have enabled the fund to achieve a 2020 year-end market value of \$127K, representing a time weighted annualized return since inception of 7.23%. To provide St. Peter's the long-term financial security intended, the growth target for the fund is \$1M.

WHAT ARE THE WAYS TO CONTRIBUTE?

- Cheque
 - You can donate a one-time gift via cheque payable to **St. Peter's General Endowment Fund** for which a tax receipt will be issued.
 - To do so, please print and fill out a *St. Peter's Endowment Fund Cash Donation Agreement* as found at www.stpeterontherock.org/endowment-fund.
 - Mail your cheque and a completed Donation Agreement to:

The Treasurer,
St. Peter's on-the-Rock
P.O. Box 1566
Lakefield, ON K0L 2H0
 - A copy of the agreement will be countersigned and returned for your record and file.

- **Securities**

- By donating publicly traded stocks and securities, you not only support St. Peter's but you receive a tax receipt for the appreciated value of the donation – and you are free from any capital gains tax. Gifts of securities can be made now or through your Will.
- To do so, please print and fill out a *St. Peter's Endowment Fund Securities Donation Agreement* as found at www.stpeterontherock.org/endowment-fund and mail to:

The Treasurer,
St. Peter's on-the-Rock
P.O. Box 1566
Lakefield, ON K0L 2H0

- A copy of the agreement will be countersigned by St. Peter's and returned for your record and file.
- You will also need to complete a *St. Peter's Gift of Securities Form* as found at www.stpeterontherock.org/endowment-fund to direct your broker regarding the transfer of securities. A copy will also need to be forwarded to RBC DS as indicated on the form.

- **Bequests**

- Making a bequest in your Will allows a gift to be directed to St. Peter's after your death. Through a bequest, your estate will receive a tax credit.
- To do so, please fill out *A Bequest and Planned Giving Statement of Intent* as found at www.stpeterontherock.org/endowment-fund and mail to:

The Treasurer,
St. Peter's on-the-Rock
P.O. Box 1566
Lakefield, ON K0L 2H0

- Suggested bequest language and pertinent information to give to your lawyer/advisors is also available at www.stpeterontherock.org/endowment-fund

St Peter's on-the Rock is a place of peace and serenity which for generations of families has been the one constant in an ever-changing world.



Your deep commitment and strong support of St. Peter's has enabled us to sustain this very special legacy for over 100 years. Tomorrow's gifts are equally important as they convey our deepest commitments and allow for the future of our Church.