

HOLY LAND LEGACY GUARDIAN PROGRAM



SOUTHEASTERN LIEUTENANCY
EQUESTRIAN ORDER OF THE HOLY SEPULCHRE
OF JERUSALEM

THE CHALLENGE

The Annual Contributions of the Knights and Dames of the Southeastern Lieutenancy of the Equestrian Order of the Holy Sepulchre of Jerusalem, along with their participation in the Mass and Gift Program, provide a significant portion of the continued support for the basic efforts of the Latin Patriarch as a beacon of hope and opportunity for Christians in the Holy Land. However, many vital projects, as identified by the Grand Magisterium with its Holy Land Commission and the Latin Patriarch of Jerusalem, require additional funding to secure their results.

The Southeastern Lieutenancy Holy Land Legacy Guardian Program exists to identify strategic opportunities and communicate critical needs in order to improve the hope, education, health, spirituality, and community of Christians so that they will not feel compelled to leave their homeland. It will also discern circumstances to preserve and protect the most sacred of sites in the Holy Land for the benefit of Christians throughout the world. The

Holy Land Legacy Guardian Program provides Knights and Dames with worthy and special opportunities to further honor their oaths as well as fulfill their duties and responsibilities to the Equestrian Order of the Holy Sepulchre of Jerusalem.

Knights and Dames not only have the obligation and ability to provide basic

sustenance for the Holy Land Christians, but they should also support the facilities and programs of worship, community and education. Without this assistance, the number of Christians in the Holy Land will continue to decrease even below the current two percent. Tantamount to providing self-sufficiency is the need to focus on those aspects of life which allow a person to acquire a skill, get a job, earn a living and, most importantly, learn how to live in a Christian way.



SPECIAL NEEDS AND CRITICAL PROJECTS

The special needs and critical projects for the Christians are not stagnate, but change as the challenges of living in the Holy Land evolve. Examples of current needs of the Holy Land Christians along with their schools and churches are many. Wherever possible, the Holy Land Legacy Guardian Program, through restricted gifts, will provide complete funding for a project rather than merely being a financial partner on larger



efforts. This will allow the participating Knights and Dames of the Southeastern Lieutenancy to be identified with where they feel the most good can be accomplished. So, rather than contributing a percentage of the funding for a new school, the Legacy Guardian Program might pay for all the computers for a class or the audio visual equipment for the school. And, if itineraries permit, the Southeastern Lieutenancy's Holy Land Pilgrimages will include visits to the Legacy Guardian Program funded projects.

LEGACY GIVING OPTIONS

Legacy giving is only for amounts over and above Annual Contributions and Mass Stipends which go towards funding basic needs in the Holy Land. When a Knight and/or a Dame makes a decision to participate in the vital Holy Land Legacy Guardian Program, the donor must first make four choices: (1) what assets are to be donated, for example cash, appreciated securities, real estate or life insurance proceeds, (2) should the donation be made now, in increments or part of a specified gift in an estate plan, (3) should the donation be used for projects the Legacy Guardian Program determines are most important or for a purpose specified by the donor provided it is consistent with the goals and directives of the Program, and (4) should the donation be used immediately or placed in an account with only the annual earnings being used?

METHODS OF GIVING

ANNUAL GIVING. Any amount above a Knight's or Dame's Annual Contributions and Mass Stipends qualifies for the Holy Land Legacy Guardian Program. The key advantage of this method of giving is the immediate benefit to the Holy Land Christians and to the donor. These donations can be made in one payment or with a pledge of up to ten annual increments. Such gifts may be tax deductible and appropriate receipts will be provided.

TESTAMENTARY GIVING. A gift, unrestricted or restricted, planned to be made upon death through a Will qualifies for the Legacy Guardian Program, provided the Knight or Dame gives the Southeastern Lieutenancy sufficient information on a confidential form so that the gift can be tracked. The Knight or Dame is free to change the provision in the Will, but it is hoped that the financial and spiritual commitment will be maintained. Such gifts can be in the form of cash, appreciated securities, real estate or any other property of value. Such gifts may be tax deductible and appropriate receipts will be provided.

LIFE INSURANCE GIVING. By making the Holy Land Legacy Guardian Program the owner of an existing life insurance policy and continuing to pay the premiums, a Knight or Dame can make a meaningful gift. In the alternative, a life insurance policy can be purchased specifically for making its ownership a gift to the Legacy Guardian Program with the Knight or Dame continuing to pay the premiums. The premiums may be tax deductible and an income tax receipt will be provided annually. The Legacy Guardian Program will be designated as the beneficiary of the policy. The Knight or Dame may stop paying the premiums, but it is hoped the financial and spiritual commitment will be maintained. If the Knight or Dame ceases to pay the premiums, to maintain the coverage the Legacy Guardian Program or another member may make the payments. The policy will be tracked through the Knight's and/or Dame's membership in the Southeastern Lieutenancy.

The Holy Land Legacy Guardian Program will have representatives who can discuss giving options and details. However, all such gifts should be reviewed by the Knight's or Dame's attorney and/or tax advisor.

DONOR PARTICIPATION AND RECOGNITION



Knights and Dames do not honor their oaths and fulfill their duties and responsibilities just to receive recognition and awards. However, special commitments are worthy of acknowledgments which also serve as

inspirations to others. Members of the Equestrian Order of the Holy Sepulchre of Jerusalem are invited to participate in one of three levels in the Legacy Guardian Program. Recognition and remembrance will be based on the level achieved.

The levels of giving can be achieved by a single gift, a pledge, a testamentary bequest or through life insurance, or a combination of these. Higher levels can be achieved by additional commitments.

The following amounts are the combined contributions of a Knight and Dame. Individual members would give half of the amounts noted in the Holy Land Legacy Guardian Program levels. All amounts are over and above Annual Contributions and Mass Stipends which go towards funding the basic needs in the Holy Land. Members may remain anonymous.

SPUR (BRONZE) LEVEL

\$10,000

Contributors at the Spur (Bronze) Level of \$10,000 will receive Remembrance at an Annual Mass in the Holy Land, Semi-annual updates on the impact of their contributions in the Holy Land,

An invitation to a Special Annual Meeting Reception with the Grand Prior and Lieutenant and receive an update on the progress of the Holy Land Legacy Guardian Program,

A listing at their contribution level in the Annual Meeting program and Lieutenancy Membership Book, with such listings to be continued posthumously, and

A specially designed Knight's lapel pin and/or Dame's brooch in the medal of their level (Bronze, Silver or Gold) which was adapted from the Equestrian Order's Coat of Arms with its motto: "Deus Lo Vult."



SWORD (SILVER) LEVEL

\$25,000

Contributors at the Sword (Silver) Level of \$25,000 will receive all the recognitions of the Spur Level (but in silver, as appropriate) plus a listing at their level on the Equestrian Order's Memorial Wall at the Co-Cathedral in Jerusalem. The listing is contingent on final payment and the size of the lettering depends on the level of giving.

JERUSALEM CROSS (GOLD) LEVEL \$50,000

Contributors at the Jerusalem Cross (Gold) Level of \$50,000 will receive all the recognitions of the Spur and Sword Levels (but in gold, as appropriate) plus (1) an invitation to share their thoughts on their Beliefs, the Equestrian Order, the Holy Land and Life, in essence their Legacy, in the Lieutenantcy Newsletter, (2) a Special Mass in the Holy Land upon their death, and (3) dinner with the Latin Patriarch after their pledge has been satisfied.

PROGRAM ADMINISTRATION

Under the jurisdiction of the Lieutenant, the Legacy Guardian Program is headed by Administrators who will oversee a Committee composed of Legacy Guardian Advisors from each diocese in the Southeastern Lieutenantcy. The Legacy Guardian Advisors are knowledgeable in the areas of estate planning and/or charitable giving, but have no conflicts of interest. They will be available to assist Knights and Dames, as well as to provide information to potential donors' attorneys and tax advisors.



The Legacy Guardian Program is very personal and requires the giving of individual attention to participants. Although other diocesan entities may have endowment or special project type plans, the Southeastern Lieutenantcy Holy Land Legacy Guardian Program is unique in that it is dedicated to providing specialized and targeted

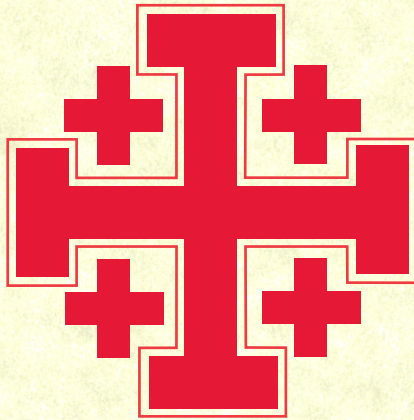
assistance to the Holy Land Christians. Because the Legacy Guardian Program is one of a kind, it is not any more in competition with such other plans than the Southeastern Lieutenantcy Mass and Gift Program competes with parish masses.

It is usual for potential Holy Land Legacy Guardian Program participants to first speak with the Administrators to clarify intentions and direction. As appropriate, a diocesan Legacy Guardian Advisor can also provide assistance.

PROGRAM ACCOUNTABILITY

Projects funded under the Legacy Guardian Program will be reviewed throughout the year, as appropriate, by The Grand Magisterium with its Holy Land Commission, the Latin Patriarch, the Southeastern Lieutenancy and the Program Administrators. Such reviews will include project progress and financing. It is paramount that Legacy Guardian Program participants are confident that their donations are wisely employed and that projects are soundly planned and executed.





Equestrian Order of the Holy Sepulchre
OF JERUSALEM
Southeastern Lieutenancy of the United States

For additional personalized information about the Southeastern Lieutenancy Holy Land Legacy Guardian Program, please contact the Program Administrators.

Dame Rebecca Anne King Stern, DGCHS, M.S.
Sir Duke Nordlinger Stern, KGCHS, J.D., Ph.D.
117 Father Hugo Drive
Greer, SC 29650-4467

(864) 479-0215
dnordstern@aol.com