
Join the St. Anne's Society

Anyone who makes a gift to the endowment fund or commits to doing so automatically becomes a member of St. Anne's Society. No minimum gift value required.

In grateful thanksgiving to God for St. Anne's Episcopal Church and as a commitment to St. Anne's future mission, I/we wish to advise the St. Anne's Endowment Committee as follows:

PRINTED NAME/S _____

Signature/s _____

Date _____

- ☐ I am or ☐ We are making a gift of cash or other assets to the Endowment Fund now.
- ☐ I or ☐ We plan to make a gift of cash or other assets to the Endowment Fund this year.
- ☐ I or ☐ We have included the Endowment Fund in my/our will or living trust instrument.
- ☐ I or ☐ We plan to include the Endowment Fund in my/our will or living trust instrument this year.
- ☐ I or ☐ We have included a gift or other bequest to St. Anne's Episcopal Church in my/our will or living trust instrument and would like to designate it as a contribution to the Endowment Fund.

In honor or memory of (OPTIONAL) _____

Please note that it is the policy of the St. Anne's Endowment Committee to make public recognition of gifts/commitments to the endowment fund, but without any reference to amounts involved. If you prefer that your name(s) not be publicly disclosed, please check here: ☐

Please return this completed note to St. Anne's church office, for the attention of the endowment committee secretary. If you have questions, please contact the committee chairman Jim Jones (703-888-6534) or jim.w.jones2011@gmail.com.

St. Anne's Episcopal Church

1700 Wainwright Drive
Reston, VA 20190



ST. ANNE'S EPISCOPAL CHURCH RESTON, VIRGINIA



St. Anne's Endowment Fund 2017 Annual Report



*"Give and it will be given to you."
Luke 6:38*



Purpose of the Fund

St. Anne's Endowment Fund was launched in 2015 with the goal of preparing and investing for the future, to ensure St. Anne's mission and ministry continues for generations to come.

Endowment Fund Operation

The endowment fund is managed by a committee of five voting members and three non-voting, ex-officio members.

Fund articles require that the principal amount from each gift is invested to generate income. Once the fund's assets average \$250,000 over a three-year period, the endowment committee will annually assign a portion of the fund (~ 4% to 7%) to support the church's operating budget. The Trustees of the Funds of the Diocese (TOTF), manages the fund's investments. TOTF charges no fee to St. Anne's for its services.

Donors can make gifts in several ways: a bequest in their will or living trust, a lifetime gift of cash, securities, property, insurance policies, or other assets, and/or gifts that provide the donor with ongoing income, such as annuities.

Endowment Fund Performance

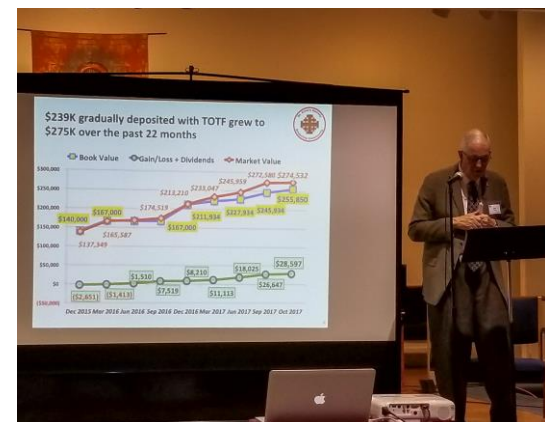
	2017
Starting balance:	\$224,186
+ Gifts:	\$ 50,698
+ Investment gain (loss):	\$ 34,030
- Expenses:	\$ (1,106)
Ending balance:	\$307,808
# Gifts received:	34

	Since Inception
Starting balance	\$ 0
+ Gifts:	\$267,853
+ Investment gain (loss):	\$ 42,250
- Expenses:	\$ (2,295)
Ending balance:	\$307,808
Total Society members:	140
# Gifts received:	126
# Bequests promised:	49



2017 Endowment Committee

Jim Jones, Chair; Michael Broddle, Secretary; Sheila Sandford, Treasurer; Chris Cameron; James Juran. Ex-officio, non-voting: Rev. Dr. John C.N. Hall, Rector; Don Boileau, Senior Warden; Jim Vollman, Acting Treasurer.



Endowment Activities in 2017

In November, the Endowment Committee hosted the second Celebration of St. Anne's Society with a reception and a presentation by Mike Kerr, CEO of the Trustees of the Funds. Mike outlined the operations of the TOTF and shared some ideas for giving that benefit us as donors, as well as our St. Anne's community.

Throughout the year, Endowment Committee members provided refreshments for coffee hour and an opportunity to chat about the Endowment.



Thank you for your generous support of St. Anne's and the Endowment Fund.

www.stannes-reston.org/st-anne-s-society