

# **Legacy Policy**

**St James the Great Church, High Wych**

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## **1. Introduction**

1.1 Here at St James the Great, High Wych we welcome all gifts in wills, however large or small, and we promise to use your gift to make a difference in our parish.

1.2 This policy outlines how the Parochial Church Council (PCC) of St James the Great, High Wych will responsibly manage and utilise gifts received through wills, supporting the church's mission and ministry for future generations.

1.3 This policy applies to all financial gifts, bequests, and endowments received through wills.

## **2. Statement**

2.1 The PCC of St James the Great, High Wych is committed to, where possible, honouring your intentions and managing legacy gifts with integrity and transparency.

2.2 However, where this is not possible, gifts will be used for general purposes of the parish and discussions on possible uses of your gift will be had with your executors when the time comes, bearing in mind your known areas of interest in the church (e.g. music, buildings, children and youth, overseas mission or aid) and the church's priorities at the time. You can be confident that your gift will be used to make a real difference.

## **3. Accepting Gifts**

3.1 We will –

- Accept gifts in wills that align with the church's mission and values.
- Encourage donors to leave gifts for the general purposes of the church to allow flexibility in addressing future needs.

## **4. Transparency and Accountability**

4.1 We will –

- Maintain accurate records of all gifts received through wills.
- Provide an annual report to the congregation on the status and impact of the Legacy Fund via the Annual Parochial Church Meeting.
- Conduct annual audits to ensure financial integrity and accountability.

## **5. Utilisation of Funds**

5.1 We will –

- Use legacy gifts to support the church's long-term mission, including capital projects, community outreach, and ministry programs.
- Consider the donor's known areas of interest (e.g., music, buildings, children and youth, overseas mission) when utilizing funds.

## **6. Donor Recognition and Engagement**

6.1 We will –

- Recognise and honour donors through various means, such as newsletters, and special events.
- Engage with donors and their families to ensure their legacy intentions are understood and respected.
- Make sure that gifts remain anonymous if the donor prefers.

**Please note** - If you would like to make a gift to our church in memory of a loved one, please email [stjameshighwychpcc@gmail.com](mailto:stjameshighwychpcc@gmail.com).

## **7. Review and Update**

7.1 This policy will be reviewed annually by the PCC Secretary and may be amended as necessary to ensure it continues to meet the needs of the church, financial regulations, and donor feedback.

## **8. Approval**

7.1 This policy was approved by the PCC on 01/04/25 and is effective immediately.