

Offerings



A Lutheran Planned Giving Newsletter

Winter 2005

The Legacy of a Generous Man

Graham Barkley was the chairperson of St. Luke's Lutheran Church for over thirty years. He was a lector, Sunday School and confirmation class teacher, worship assistant and steward of visitation. He regularly made up the weekly church bulletin, annual reports, etc. This was in addition to his community activities as a volunteer with the local hospital auxiliary, C.N.I.B., Heart and Stroke Foundation, and the Canadian Cancer Society. For nearly twenty years he was a weekly visitor to the complex care wing of the hospital as part of a group called the "Sunshine Circle".

When he died one year ago, no one was particularly surprised to learn that a large portion of his estate was left to his church.

After 35 years as a teacher in Ottawa and small towns nearby, Graham retired to a house directly across the road from where he was born, Williamsburg Township in

eastern Ontario. During the two decades of his retirement, he occupied himself with the joys of gentleman farming: raising a multitude of cats, a dog, a few chickens, and a duck that he hatched from an egg. He loved to be near his family, he loved to be near his church, he loved loud shirts, wild colours, flowers, birds, cats, food, knitting, poetry, bowling, volunteering, playing Bingo, and entertaining. Graham loved to try new things, like hitching up behind a snowmobile with a pair of water-skis – also known as "snurfing" – and rollerblading down the road in front of his house.

Even before his retirement, Graham was a mainstay of St. Luke's. He returned to his parents' house and attended church in Dunbar every weekend during his years in Ottawa. His commitment and contributions to the overall stewardship of the congregation set an example for his

fellow members. There is no question that his death has left a big hole for the congregation to fill.

Graham's estate planning resulted in the proceeds of an insurance policy going to Waterloo Lutheran Seminary and the residue of his retirement funds to his congregation. Other gifts went to family members and his favourite charities. Even though he wasn't a rich man, he was able to leave behind a substantial legacy.

continued on page 2



In this issue...


The Lighter Side.....	2
The Will to Live?.....	2
A Faith Preamble to Your Will	3
Longer Life, Part 2	3
What We Lived For.....	4

The Legacy of a Generous Man

continued from page 1

One part of that legacy resides in several generations of students whom he taught with liberal helpings of kindness and good humour. A second part is his service to church and community organizations, who will miss his hard work and commitment. The third part of Graham Barkley's legacy is financial. His unrestricted gift was made out of concern for the financial viability of his small rural congregation. The church

council will have to decide how best to use it.

Contrary to what some might have predicted, St. Luke's is adjusting to life without Graham. Attendance at worship is holding firm, people's offerings have increased and volunteers are stepping in to fill the roles that Graham used to occupy. In his wisdom and generosity, Graham Barkley left a legacy that has enriched and strengthened the people he left behind. 

The Will to Live?

Want to add ten years to your life? Make a will. Want to live even longer? Include a charitable bequest in your will.

These are the unexpected, startling research findings of Richard Radcliff, chairman of Smee & Ford, the leading bequest agency in the United Kingdom. Radcliff related these findings in a presentation at the 2001 annual meeting of the Canadian Association of Gift Planners, held in Halifax, Nova Scotia.


Contrary to what many people believe, this research indicated that making a will did not bring about an early death; in fact, quite the opposite. Radcliff and his associates discovered that people who didn't have wills lived an average of 68

years, those who had wills, 79 years, and those who had included a charitable bequest in their will outlived them all – 82 years. No reasons were offered for this interesting data, just the facts.



Since this research was done after people had died, Radcliff, along with us, is left to speculate on the connection between cause and effect.

Maybe there is none, but since the research involved thousands of people over a 20-year period and covered all of England, it does seem significant.

This article originally appeared in The Messenger, a publication of the Evangelical Mennonite Conference, and is reprinted with the permission of the author and publisher. 

The Lighter Side

As the date of his retirement approached, Earl went to see his doctor for a full physical check-up. After two visits and exhaustive lab tests, the doctor said he was doing "fairly well" for his age. A little concerned about that comment, Earl couldn't resist asking, "Do you think I'll live to be 80?"

The doctor asked, "Well, do you smoke tobacco or drink hard liquor?" "Oh no," the patient replied. "I've never done either."

Then he asked, "Do you eat T-bone steaks and barbecued ribs?" Earl said "No, I've heard that all red meat is very unhealthy!"

"Do you spend a lot of time in the sun, like playing golf, sailing, or lying around the pool?"

"No, I don't," Earl said.

The doctor persisted, "Do you gamble, drive fast cars, or sexually fool around?"

"No," Earl replied. "I've never done any of those things."

The physician looked at Earl and asked, "Then why do you care if you live to be 80?"

A Faith Preamble to Your Will

Does your will say anything about your faith? Does it tell the people reading it what you believed?

Lutheran Planned Giving has a short document with two samples of a faith pre-

amble to a will. You can use one of these as is, or create your own statement using the document as a guide. Then, the next time you revise your will, you can ask your lawyer to add your personal faith preamble.

To get a copy, contact LPG at 1-888-308-9461 or lpg@worldchat.com. Be sure to include your name and full address in the message so we can mail one out to you.

Longer Life, Part 2

Does it seem that your congregation is older than the population at large? It may not just be your imagination.


A research study published in *Health Psychology*, in May 2000 found that "Religious involvement was significantly associated with lower mortality . . . indicating that people high in religious involvement were more likely to be alive at follow-up than people lower in religious involvement." The authors, from three U.S. universities and the National Institute for Healthcare Research, examined data from 42

other research studies on the link between religion and longevity. They concluded that "the basic finding was robust: religious involvement is as-



sociated with higher odds of survival (or conversely, lower odds of death) during any specified follow-up period." In other words, people who live their faith also live longer.

One can only wonder if going to church *and* making a will with a bequest to that church compounds the effect on life expectancy.

Longer life should not be confused with *eternal* life, but church attendance is recommended as the way to gain further insight on that subject also. 

Offerings is a publication of Lutheran Planned Giving, a ministry of the Evangelical Lutheran Church in Canada. Lutheran Planned Giving does not provide or purport to provide legal or tax counsel. We urge our readers to consult with and rely upon the opinion of qualified legal, tax and financial advisors before implementing any of the ideas

Lutheran Planned Giving
Jeff Pym, Director
385 Torrance Street
Burlington, ON L7R 2R7
1-888-308-9461
lpg@worldchat.com

What We Lived For

A pastor recently commented on what he sees as a growing trend among his parishioners. More and more obituaries end with the words, "in lieu of flowers, donations may be made to the XXX Society". The organization mentioned is usually a charity named after a disease or body part: cancer, heart, arthritis, kidney, etc. Bemoaning the fact that many of the obituaries described people who were tremendously dedicated members of his church, he asked "Why do people want to be remembered for what they *died* of rather than what they *lived* for?"

We could look at his comments in a purely practical way. The church needs donations as much as any other charity. A memorial donation to a Lutheran congregation may do as much good (or more) as money contributed to any of the disease foundations. So why couldn't our congregation be suggested "in lieu of flowers" to those who want to donate in our memory?

The same question could be asked of planned gifts. It is natural – and good – to include in one's will a gift to a charity that has helped us cope with a debilitating disease. But why not remember


the church in the same manner? Think of how the church's sacraments and ministries have embraced us throughout our life: in baptism and Holy Communion; through Sunday School, confirmation, Luther League and marriage; in celebration and consolation; in health, sickness, infirmity and death. Is this not a relationship worth remembering with thanksgiving?

But there is a deeper dimension to the pastor's question. Memorial gifts are about *memory*, the things for which we want to be *remembered*. How many of us have taught Sunday School, served on the altar guild, provided volunteer janitorial service, sung in the choir? Or been the church's organist, treasurer, lawn-mower, assisting minister, secretary, youth group leader? Made quilts for CLWR, worked a shift in the out-of-the-cold program, helped to sponsor a refugee family? How often have we volunteered for the Congregational Council or a committee, sometimes against our better judgment, because no one else would step forward? How many fund-raising events, pot-luck dinners and funeral lunches have we cooked and baked for?

In short, how much of our identity is found in the opportunities for serving others that our church represents? *That* is what many of us have lived for, what has given meaning to our life. Do we want to be remembered as someone who committed their life to serving God and God's people, or merely as another person who died of heart disease?

Douglas John Hall, the great Canadian theologian, explored this theme in his marvellous book *The Steward: A Biblical Symbol Come of Age*. Hall said, "Stewardship must be understood first as descriptive of the being – the very life – of God's people. Deeds of stewardship arise out of the being of the steward."

The document that expresses our final wishes on the disposition of our worldly affairs is called a last will and *testament*. In it we *testify* about who and what has mattered to us; we give *testimony* to our most cherished values.

As we make our plans for the future, whether they are financial, estate or funeral plans, let's remember what we lived for and help others remember us for who we really are. 

Let Us Know

If you:

- have a comment, question or quibble;
- need more information;
- want to share a story or tell us about your gift

You can reach us at:

Lutheran Planned Giving
1-888-308-9461
lpg@worldchat.com

If you received more than one copy of this newsletter, please pass a copy on to someone who might appreciate the opportunity to learn more about planned giving.