Episcopal Church Foundation in West Texas ©
The investment arm of the Episcopal Diocese of West Texas

About
The Episcopal Church Foundation in West Texas is a Texas non-profit corporation that is exempt from federal income tax under Section 501(c)3. It is a charitable religious organization governed by a Board of Directors that includes the Bishop of the Episcopal Diocese of West Texas. Its Executive Director and staff manage the Foundation’s daily activities.

The Foundation was created by the Diocese to:
- Invest and manage funds of the Diocese
- Be an investment resource to churches and institutions of the Diocese
- Encourage and promote legacy stewardship within the Diocese

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The Board of Directors
- Ted Burkhart, Stockbroker
  St. Luke’s, San Antonio
- Rt. Rev. Gary Lillibridge,
  Diocesan Bishop
- Ed Longcope, Investor
  St. Mark’s, San Marcos
- Robert McAllen, Retired Vicar
  Epiphany, Raymondville
- Richard Mosty, Attorney
  St. Peter’s, Kerrville
- Elizabeth Nisbet, Investor
  Good Shepherd, Corpus Christi
- Allan Paterson, Retired Attorney
  Christ Church, San Antonio
- Gregg Robertson, Investor
  Good Shepherd, Corpus Christi
- Charles Thompson, Jr., Investor
  St. John’s, McAllen

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For Congregations

Individual congregations can use the expertise of the Foundation in a variety of ways.

Investment Services

One of the ways is to engage the Foundation to invest endowment funds on behalf of the church. The church retains full discretion regarding distributions from its separate investment account.

Advantages of this approach are:

- Independent selection of professional investment managers
- Regular monitoring of performance
- Administration and oversight
- Investment decisions removed from local church influences
- No fees payable to the Foundation

Education and Consulting Services

A church can use the consulting services of the Foundation to assist in creating a legacy stewardship program for the church if a program is not already in place. Also, the Foundation is available to consult with a church vestry or committee about their existing investment program even if the church decides to continue handling its own investments.
For Individuals

The Foundation is available to work directly with individuals who may be planning a gift to the Diocese or their church.

These services include:

- Assisting in refining objectives of the gift
- Information about gift instrument alternatives
- Discussion of and education on tax implications of alternative instruments
- Serving as trustee, if needed
- Investing and administering gift funds
Legacy Stewardship

Stewardship teaches that all that we have and all that we are is a gift from God. We are the stewards – not only of our financial resources, but also of this created earth, our time, our talents, our families, our relationships, life itself, but most importantly of God’s word. Christian stewardship is using these gifts God has given us, to do the work God is calling us to do.

*Legacy giving (planned giving) is the ultimate stewardship*

It is the way in which you dispose of the assets you’ve accumulated during your lifetime—who will use your “stuff” when you no longer need it? It is the opportunity to leave a gift that constitutes a legacy to generations yet unborn and a final witness to those who you hold most dear. Ninety percent of these types of gifts are simple gifts made through wills. Frequently these gifts go to sustain missions and ministries that have blessed your life, or they may be intended to create new mission or ministry.

*Make a difference for generations to come – Start planning today. Visit the Stewardship section of the diocesan website.*