



SEMINARY OF THE  
SOUTHWEST

AN EPISCOPAL SEMINARY

# LEGACY

AN ESTATE AND CHARITABLE PLANNING NEWSLETTER



Lee and William Speary

## Honoring a Mother's Life

Col. William (Bill) and Mrs. Lee Speary have been generous supporters of Seminary of the Southwest for more than 20 years. Always generous with their time and resources, the Spearys approached Southwest in 2010 to discuss a planned gift that would reflect their longtime commitment to our mission and honor a beloved family member whose personal journey led Bill's family to the Episcopal Church.

Bill's mother, Wilhelmina Helena Meyer Speary, was a first-generation Texan and a longtime member of St. Paul's Church in Runge, Texas. Born in Helena, Texas, on Oct. 30, 1886, her history is a fascinating one that moves in tandem with the early history of Texas.

Wilhelmina's German immigrant parents, Anna and Albert Meyer, purchased 100 acres in Karnes County, Texas, in the mid-1880s. The Lutheran family brought in a private tutor for Wilhelmina's education. The tutor, Mrs. Dubord, was an Episcopalian and recommended in 1898 that Wilhelmina be sent to St. Mary's Episcopal School for Girls in San Antonio where her education continued and her commitment to the Episcopal Church began.

In honor of his mother, Bill established the Wilhelmina Meyer Speary Endowed Scholarship Fund with a gift of \$100,000. This endowed fund will support seminarians in perpetuity. He has also included a bequest to Seminary of the Southwest in his estate plans to continue to grow the fund in Wilhelmina's honor and to support the church that was instrumental in her education and spiritual growth.

### Learn How You Can Help

To learn more about including Southwest in your future plans through a bequest or other planned gift, contact Eric Scott at 512.439.0326 or [eric.scott@ssw.edu](mailto:eric.scott@ssw.edu).



# Even 1% Matters

## Make a Big Difference by Donating a Small Percentage of Your Estate

Do you ever feel like you would like to leave a legacy, but are unsure about your next steps—or if you are even the type of person who could do such a thing? **We have good news: Anyone can leave a legacy and make a difference that will impact future generations.**

One of the simplest and most reasonable ways to craft your legacy and make a difference is by leaving us a percentage of your estate. Including a gift of a percentage of your estate or a percentage of your residual estate ensures that your donation will remain proportionate to your estate size, no matter how it fluctuates over the years.

### Making Your Gift

Following are popular ways to leave a percentage of your estate to our organization:

**Include a gift in your will or revocable living trust.** By putting aside a percentage of the assets in your will or trust—from 1 to 100 percent—you can leave a legacy while making sure your

family has the security they may need in the future. Plus, it is easy! See the article on the next page for quick step-by-step directions on including a gift in your will or trust.

**Name us as partial beneficiary of your retirement plan assets or life insurance.** By dividing up your assets in percentages, you can benefit loved ones *and* us. To make this type of gift, simply contact the administrator of your retirement account or insurance company for a change-of-beneficiary form today.

### Did You Know?

If your children are the beneficiaries of your retirement plan assets, federal income taxes may erode a substantial portion of the amount they receive. Thanks to our tax-exempt status, however, we receive retirement plan assets tax-free.

### Let Us Know

If you have already included a gift to us in your estate plans, please notify us by returning the enclosed survey. That way we can ensure that your gift will be used exactly as you intend. Plus, it would be our honor to thank you for your gift.

We are here to help if you have any questions about extending your impact into the future. Please feel free to contact us today.



## Change Your Mind at Any Time

We realize that circumstances change and your gift of a percentage of your estate may no longer be possible at some future date. Your family and friends come first, and that's why this type of gift works for so many of our supporters—you can change your mind at any time.

# Making Your Gift

## 4 Easy Steps to Including a Gift in Your Will or Trust

Remembering us in your will or trust is one of the most enduring statements you can make about your belief in our mission. The support you have offered during your lifetime can endure for years to come.

Your gift can be a specific asset, such as a certain amount of cash, securities or property, or a percentage of your estate. Plus, a gift in your will is flexible—it can be updated or revoked at any time—and it can be accomplished in as few as four steps (see below). If you have questions during the process of including a gift in your will or trust, please do not hesitate to contact us.

### STEP 01»

Determine whether you'd like to make a gift of a specific amount or if you'd like to leave a percentage.

### STEP 02»

Decide if you want to direct your gift to help particular projects or leave your gift unrestricted, allowing it to be used for our most pressing needs.

### STEP 03»

Contact us or return the enclosed survey to receive sample language needed to complete your gift.

### STEP 04»

Share the sample language with your attorney so your gift can be put in place.



## Ask the Experts

When creating or reviewing your estate plans, we recommend you seek the help of an attorney. Our FREE guide ***The Top 6 Questions to Ask Your Estate Planning Attorney*** will help you collect your thoughts before you meet and make the most of your time together. Return the enclosed survey to receive your copy today.

# Preparing for Future Generations

The Very Rev. Barkley Thompson and his wife, Jill, are no strangers to the Seminary of the Southwest campus. A Master of Divinity graduate of the Class of 2003, Barkley was recently installed as the dean of Christ Church Cathedral in Houston and serves as a member of the Seminary of the Southwest board of trustees.

Before they left campus, Barkley and Jill knew it was important to be clear about the intent of their estate. The birth of his first son, Griffin, stirred in Barkley a lesson his father has always imparted on him: keep your affairs in order. Barkley and Jill heeded his father's advice and established a college fund, purchased life insurance and executed their wills.

Barkley says, "One of the myriad ways that the church has influenced my life has been through the lesson that a percentage of that with which one has been blessed ought to be given back to God.

"Seminary of the Southwest formed me for ministry in ways that become newly manifest all the time. One could say the seminary left its legacy within me. In order

to ensure Southwest's ability to form the next generation of priests, I have chosen to be a part of the John Hines Legacy Society, so that my contribution to the seminary will continue even after I have entered larger life. In addition to my annual contribution, the Legacy Society is the way I will give back in gratitude to a place of such abiding meaning for me."

Already young leaders in the Episcopal Church, Barkley and Jill represent a new generation of supporters who understand that planning for the future can never happen too early in life.

If you are interested in leaving a gift to Southwest after your lifetime, contact us for gift options that fit your needs.



The Very Rev. Barkley Thompson and his wife, Jill, joined the John Hines Legacy Society by including Southwest in their estate plans.

## The Episcopal Church Foundation can be a third-party resource to you.

If you would like to discuss the various Life Income Gift options with a third-party before or during your process of committing to the seminary, please call Planned Giving at ECF at (800) 697-2858. They will provide a personalized illustration of what your gift would look like, showing payments, the charitable deduction, and tax benefits. For additional information, please contact ECF or visit [www.EpiscopalFoundation.org](http://www.EpiscopalFoundation.org) or [episcopalgifts.org](http://episcopalgifts.org).

## Next Steps Crafting Your Legacy

1

**Return** the enclosed survey to request our FREE guide *The Top 6 Questions to Ask Your Estate Planning Attorney*.

2

**Visit** [ssw.edu](http://ssw.edu) to learn more about our mission and how you can provide support.

3

**Contact us** for help finding the donation option that makes the most sense for you.



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