



*“For surely, I know the plans I have for you says the LORD. Plans for your welfare and not for harm to give you a future with hope!”*

*Jeremiah 29:11*



## FIRST PRESBYTERIAN CHURCH OF LIVERMORE IS ESTABLISHING A LEGACY FUND

### WHY IS THE LEGACY FUND BEING ESTABLISHED ?

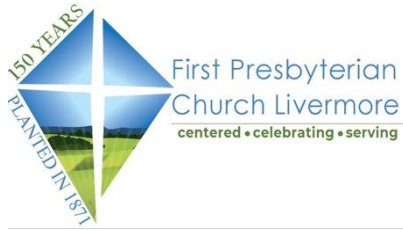
**Provide invitations for members and friends of FPCL** to support opportunities to donate gifts and resources to make and impact in the lives of those being served by its ministry today and in the future.

**Provide a roadmap** that represents many paths (not just estate planning) for those interested.

**Enable special consideration** on how the funds can be utilized that align with the passion and/or interests of the donors.

**The Legacy Fund** will provide giving opportunities to **expand the mission and ministry of FPCL**. The Legacy Fund is not meant to be a substitute for giving that supports our annual budget or special offerings received throughout the year.

Proposed Ministry Areas :	
Mission and Outreach	Supports ministry partners' greatest needs (locally and globally)
Worship and Music	Provides resources for supplemental events and concerts
Discipleship	Providing opportunities for spiritual growth, care and intellectual pursuits
Children, Student and Families	Provides resources to strengthen, engage and support families.
Capital Improvements	Resources for upkeep and new requirements
Undesignated	Provides flexibility to support unexpected or unfunded needs



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## GOVERNANCE

The Legacy Advisory Board is established by Session to advise and assist Session in carrying out the purposes of the Legacy Fund and its accounts.

The duties of the Board are:

- **To meet with prospective donors** to discuss how the funds may be utilized that **align with their passion and/or interests**.
- To advise and report to Session on the establishment of accounts within the Legacy Fund.
- To report to Session on a regular basis the receipts, expenditures, and current balances of each account within the Legacy Fund.
- To maintain a record of the purpose(s) for which each account was established, including any language specified in a bequest or specified by a donor.
- To oversee the investment of the Legacy Fund.

The available balance in the Legacy Fund should be invested consistent with the need to provide liquidity and the potential for investment income. Any income received from investing the Fund should be distributed among the various accounts on a regular and equitable basis. However, the primary purpose of the Fund is to meet current or planned needs and not to generate income.

The Legacy Advisory Board members include:

- The Senior Pastor/Head of Staff.
- The church accountant.
- At least one member of Session, elected by Session.
- At least one active participant in the life of the congregation who is not currently serving on Session, appointed by the Pastor.

Session may delegate authority to approve expenditures from a given account as it deems most appropriate. For example, delegation may be to a Session committee, to an individual member of Session, or to church staff.

This policy statement may be amended at any time by Session, provided that purposes established in a bequest or designated by a donor will always be honored.



## *First Presbyterian Church of Livermore*

### *Next Steps*

#### Next Steps :

- **Gain approval from Session to proceed.**
- **Establish Legacy Advisory Board.**
- Each ministry area will provide Top Five (5) prioritized opportunities that would benefit from a donation.
- Define communication strategy and helpful supporting materials.

#### Timeline :

- **Provide an overview at the Annual Meeting of the Congregation on January 25, 2026.**
- Review and discussion of Top Five (5) prioritized opportunities by ministry at February Session Meeting.
- Establish and discuss members of Legacy Advisory Board