



Geof Park
Director

About the Team

Estate planning is about Christian responsibility and the opportunity to make a lifelong difference. After all, if God has given us everything we need during our life to survive and prosper, then at death, shouldn't we plan to use what is left to glorify God? We help our clients do just that, by helping with their estate plans, retirement income and more.

Lives Touched

Sometimes some of the best experiences come from unexpected sources, and this one was certainly unexpected. One of my favorite "ambassadors" for trust services is Anita Mackey. At the young age of 105, she never fails to tell anyone she is talking to about those "wonderful people" in planned giving that have helped her to live out her life comfortably.



Linton Manier
Trust Development Officer

A few years ago, she called to tell me about a close friend who she thought needed my help. After a short chat with Anita, I dialed her friend's number. When she answered, I was sure she was just in her teens; her voice was high and squeaky and sounded like it could be coming from a cartoon character. She began to explain that her sister had passed away and had left all her investments to her. She didn't have anyone to help her and would appreciate my help.

Soon I found myself on a plane to Aurora, Ill. When I walked up to her door, I couldn't help but notice that the little house,

though more than 100 years old, was freshly painted and tidy. Soon she came to greet me and invited me in. The house was full of treasures from many trips, and photos of family filled the shelves.

That's when the story began. Bettie Jayne was the youngest of two sisters. She lived in the home that she was born in. Grandma, mom and her sister had all passed away. Neither she nor her sister had ever married. Her friendship with Anita Mackey had blossomed when she was asked to work as Anita's assistant. Her sister liked to invest and would buy investments after each payday. It was so much fun that Bettie asked her sister to invest for her. She didn't have many expenses, so all the extra money either went into the bank or into investments.

Through the years, Bettie and her sister went on many trips with Anita and her husband and Bettie had many opportunities to hear about Anita's church and the good work it did. When Bettie talked to me about who she wanted to leave her funds to when she passed, she mentioned two charities and said that she wanted to leave the rest to Anita's church. Although Bettie hadn't ever had a church of her own, she was convinced that Anita's church could be trusted to use the money for a good cause. Bettie eventually moved to Scholl Canyon estates to be near the good folks that helped her with her estate plan.

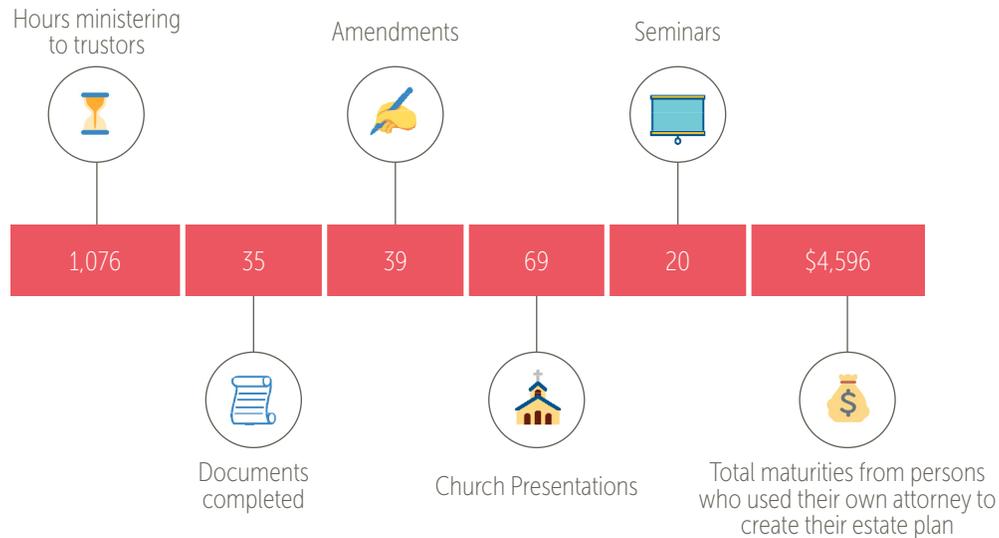


This is a story about how a friendship and a life well lived affected a person who had never attended church. It is a story of what happens when you let your light shine.

Bettie passed away recently, and I still miss her. At her passing, she left a very large gift that will enable this conference to do great things for the Lord.

Of course, Bettie isn't the only one who has touched our lives during the past four years. There have been many more. Let me share briefly what we have experienced in this quadrennium:

2015-2018



These are more than just numbers. They represent lives changed. Legacies preserved. Family burdens lifted. *This* is what estate and gift planning truly means.

Blessings,

Geof Park

*Director, Planned Giving & Trust Services
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