THE ADVENT FOUNDATION

2019 ANNUAL REPORT

The Episcopal Church of the Advent
141 Advent Street
Spartanburg, South Carolina 29302
864-585-2268  864-504-3689
www.churchofadvent.org
kjennings@churchofadvent.org
Our Advent Foundation

The Advent Foundation was created by and for the Church of the Advent in 1983 to honor our history, to sustain the present, and to nurture the future. The fundamental purposes in creating the foundation were the commitment to our outreach ministries and to address the aging and renewing of the church's physical assets. In recent years with the creation of the Father Caldwell Fund, much of our pastoral care is provided through our endowment as well. In short, our commitment is "To Know Him and to Make Him Known" in all that we do and with all that we have. To "Show Christ's Light" in honoring those who have gone before us and to assure the future of our Episcopal Church of the Advent.

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Please Note: The Episcopal Church of the Advent is not engaged in rendering legal or tax advice. For advice and assistance, donors are urged to consult an attorney or professional advisor.
### THE ADVENT FOUNDATION
**STATEMENT OF REVENUES, EXPENSES, & OTHER CHANGES IN ASSETS**
**SEPTEMBER 30, 2017 - 2019**

#### Revenues

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$ 223,369</td>
<td>$ 235,408</td>
<td>$ 85,090</td>
</tr>
<tr>
<td>Life Ins Premiums Recd</td>
<td>28,790</td>
<td>-</td>
<td>5,100</td>
</tr>
<tr>
<td>Columbarium Sales</td>
<td>15,699</td>
<td>15,502</td>
<td>10,630</td>
</tr>
<tr>
<td>Investment Income (Loss)</td>
<td>244,975</td>
<td>390,487</td>
<td>699,167</td>
</tr>
<tr>
<td><strong>Total Revenues (Loss)</strong></td>
<td><strong>512,833</strong></td>
<td><strong>641,397</strong></td>
<td><strong>799,987</strong></td>
</tr>
</tbody>
</table>

#### Expenses

**PROGRAM SERVICES**

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance Premiums</td>
<td>-</td>
<td>-</td>
<td>5,357</td>
</tr>
<tr>
<td>Niche Lettering</td>
<td>1,089</td>
<td>2,610</td>
<td>409</td>
</tr>
<tr>
<td>Board Approved Expenses</td>
<td>15,832</td>
<td>11,712</td>
<td>4,491</td>
</tr>
<tr>
<td>Pension Benefits</td>
<td>41,335</td>
<td>39,957</td>
<td>38,086</td>
</tr>
<tr>
<td>Church of the Advent</td>
<td>313,877</td>
<td>320,299</td>
<td>270,289</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
<td><strong>372,133</strong></td>
<td><strong>374,578</strong></td>
<td><strong>318,632</strong></td>
</tr>
</tbody>
</table>

**SUPPORT SERVICES**

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPCFoundation Admin Fees</td>
<td>39,797</td>
<td>40,354</td>
<td>38,746</td>
</tr>
<tr>
<td>Accounting &amp; Consulting Fees</td>
<td>850</td>
<td>-</td>
<td>1,000</td>
</tr>
<tr>
<td>Actuarial Fees</td>
<td>2,750</td>
<td>575</td>
<td>-</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>1,093</td>
<td>720</td>
<td>8,330</td>
</tr>
<tr>
<td><strong>Total Support Services</strong></td>
<td><strong>96,251</strong></td>
<td><strong>93,317</strong></td>
<td><strong>98,835</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenues less Total Expenses</td>
<td>44,449</td>
<td>173,502</td>
<td>382,520</td>
</tr>
</tbody>
</table>

#### Net Assets - Beginning of Year

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re unrestricted</td>
<td>7,603,262</td>
<td>7,429,760</td>
<td>7,047,240</td>
</tr>
<tr>
<td>Restricted</td>
<td>6,048,060</td>
<td>6,181,624</td>
<td>6,202,458</td>
</tr>
<tr>
<td><strong>Total Net Assets - End of Year</strong></td>
<td><strong>$7,647,711</strong></td>
<td><strong>$7,603,262</strong></td>
<td><strong>$7,429,760</strong></td>
</tr>
</tbody>
</table>

### THE ADVENT FOUNDATION
**STATEMENT OF NET ASSETS - SEPTEMBER 30, 2017 - 2019**

#### Unrestricted

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>18.8%</td>
<td>25.8%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Lay Pension Fund</td>
<td>3.0%</td>
<td>3.9%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Montgomery Unrestricted Fund</td>
<td>6.9%</td>
<td>3.6%</td>
<td>11.6%</td>
</tr>
<tr>
<td><strong>Total Unrestricted</strong></td>
<td><strong>12.5%</strong></td>
<td><strong>15.8%</strong></td>
<td><strong>5.8%</strong></td>
</tr>
</tbody>
</table>

#### Restricted

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manning Fund</td>
<td>-2.7%</td>
<td>-0.6%</td>
<td>3.9%</td>
</tr>
<tr>
<td>St. Cecilia Fund</td>
<td>-2.1%</td>
<td>-0.6%</td>
<td>4.0%</td>
</tr>
<tr>
<td>St. Luke's Fund</td>
<td>-2.7%</td>
<td>-0.6%</td>
<td>3.9%</td>
</tr>
<tr>
<td>St. Helena's Fund</td>
<td>-2.6%</td>
<td>-0.5%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Altar Guild</td>
<td>2.2%</td>
<td>4.2%</td>
<td>84.5%</td>
</tr>
<tr>
<td>Brotherhood of St. Andrew</td>
<td>2.1%</td>
<td>4.1%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Kathryn Hayes Educational</td>
<td>-2.6%</td>
<td>-0.5%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Satterlee Parlor Fund</td>
<td>2.1%</td>
<td>4.1%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Montgomery St. Luke's Clinic</td>
<td>1.4%</td>
<td>3.6%</td>
<td>8.2%</td>
</tr>
<tr>
<td>St. Fiacre Fund</td>
<td>3.8%</td>
<td>5.4%</td>
<td>9.0%</td>
</tr>
<tr>
<td>Episcopal Church Women</td>
<td>2.1%</td>
<td>10.1%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Font Fund</td>
<td>2.1%</td>
<td>4.1%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Paint Fund</td>
<td>2.1%</td>
<td>4.1%</td>
<td>8.7%</td>
</tr>
<tr>
<td>W.Caldwell Pastoral Care Fund</td>
<td>-2.5%</td>
<td>-1.8%</td>
<td>7.4%</td>
</tr>
<tr>
<td>Clay Turner Fund</td>
<td>-2.6%</td>
<td>-0.3%</td>
<td>4.4%</td>
</tr>
<tr>
<td><strong>Total Restricted</strong></td>
<td>-2.2%</td>
<td>-0.3%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

#### Net Assets - End of Year

<table>
<thead>
<tr>
<th></th>
<th>9/30/2019</th>
<th>9/30/2018</th>
<th>9/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Assets - Beginning of Year</td>
<td>7,603,262</td>
<td>7,429,760</td>
<td>7,047,240</td>
</tr>
<tr>
<td><strong>Total Net Assets - End of Year</strong></td>
<td><strong>$7,647,711</strong></td>
<td><strong>$7,603,262</strong></td>
<td><strong>$7,429,760</strong></td>
</tr>
</tbody>
</table>
The Advent Foundation - Description of Funds

**Unrestricted Funds**
Assets not subject to donor-imposed stipulations

**The Unrestricted Fund** - The unrestricted fund accounts for contributions not designated to one of the other restricted funds shown below. The two main purposes of the Unrestricted Fund are maintenance and outreach.

**The Lay Pension Fund** (established by the Vestry in 1985 under terms of a defined benefit pension plan) - The fund's principal and net income are used to provide retirement benefits to lay employees of the Church of the Advent, actuarially determined.

**The Montgomery Unrestricted Fund** (established in 1996 under terms of the will of Mr. Walter S. Montgomery) - The fund's principal is endowed with net income expendable at the discretion of the Advent Foundation Trustees.

**Restricted Funds**
Permanently restricted net assets - Net assets subject to donor-imposed stipulations that they be maintained permanently by the Foundation. These assets are usually governed by trust documents.

**The Manning Fund** (established in 1938 under terms of a will by a member of the parish) - The fund's principal is endowed and income is to be used for the relief of sick and suffering persons in the City of Spartanburg or for the cause of Evangelical Christian Missions as deemed best by the Board of Directors.

**The St. Cecilia Fund** (established in 1987 by an anonymous member of the parish) - The fund's principal is endowed and income is to be used for special musical events within the Church of the Advent.

**The Altar Guild Fund** - The fund's principal and net income are held in trust for the Altar Guild of the Church of the Advent with the use of funds determined exclusively by the Altar Guild.

**The Montgomery St. Luke's Clinic Fund** (established in 1996 under terms of the will of Mr. Walter S. Montgomery) - The fund's principal is endowed with net income to be used for the benefit of the St. Luke's Free Medical Clinic serving the City of Spartanburg's needy.

**The Brotherhood of St. Andrew Fund** – The fund's principal and net income are held in trust for the Brotherhood of St. Andrew with the use determined exclusively by the Brotherhood.

**The Kathryn N. Hayes Educational Fund** (established in 1997 under terms of the will of Kathryn N. Hayes) - The fund's principal and net income is to be used at the discretion of the Director of Christian Education for the purposes of Christian Education.

**The Satterlee Parlor Fund** - The fund's principal, and net income are held in trust for the Vestry to be used in totality for the renovation of the parlor.

**The St. Fiacre Fund** (established by the Vestry in 1998) - Income generated from the corpus of this fund is directed to the preservation, beautification, maintenance, and security of the cemetery, churchyard, and for the future needs of niche and memorial spaces.

**The St. Luke's Fund** (established by the Vestry under terms of a trust agreement dated 1992) - The fund's principal and net income is devoted to the welfare and benefit of the people in the Spartanburg community. Such funds shall be generally described as "outreach funds" and shall be utilized for the support of agencies or organizations designed to alleviate hunger, to alleviate homelessness, to provide
health-care needs, and to provide aid with programs geared to assist those who live in or near the poverty level. Such purposes shall include education, food, clothing, housing, medical care and other necessities of life.

**The St. Helena's Fund** (established by the Vestry under terms of a trust agreement dated 1992) - The fund's principal and net income is devoted to the maintenance of the physical plant and properties of the Church of the Advent. Such fund shall be generally described as "plant maintenance funds" and shall be utilized for maintenance, repairs, renovations, and proper upkeep of the buildings and grounds owned by the Church of the Advent. The purposes shall not include capital expenditures for improvements or additions to the property. Such funds shall be devoted to the preservation and maintenance of present or future properties, which are owned or acquired by the Church of the Advent through sources other than the St. Helena's Fund.

**The Episcopal Church Women (ECW) Fund** - This fund was established in 2004 by transfer from a long-standing investment account with Smith Barney. The fund's principal and net income are held in trust for the ECW of The Episcopal Church of the Advent with the use of funds determined exclusively by the Episcopal Church Women.

**The Font Fund** - This fund was transferred from the Church of the Advent. It was carried for 10+ years as a designated fund for the purpose of paying expenses for a large carving that is being done by Carlos Gutierrez to fit in the niche where the baptismal font is in the front of the church. In 2006, the Church of the Advent treasurer requested the funds be placed in the Advent Foundation for investment purposes. This fund will be used only for expenses related to the baptismal font carving.

**The Paint Fund** - This fund was transferred from the Church of the Advent. It was carried for 8+ years as a designated fund for the purpose of paying expenses incurred in painting the church interior. In 2006, the Church of the Advent treasurer requested the funds be placed in the Advent Foundation for investment purposes. This fund will be used only for expenses related to painting the church interior.

**The Turner Fund** - The principal and net income of this fund shall be devoted to major repairs and capital replacements of the furniture, equipment, buildings and grounds owned by the Church of the Advent, including future acquisitions. Its purpose shall not include expenditures for routine maintenance, upkeep, or minor repairs to the property. The balance of the Satterlee-Cornerstone Capital Fund was moved into this fund for the year ended September 30, 2011.

**The Reverend Waller W. Caldwell, Jr. Pastoral Care Fund** - This fund was established June 1, 2012. The annual distributable income amount shall be used to support the position of an Associate Rector whose primary responsibilities shall be devoted to pastoral care needs of the Church of the Advent parishioners. The support shall cover salary and housing, but not health insurance, pension contributions, or professional expenses. The fund shall be maintained as a capital fund and income only shall be disbursed in accordance with the terms of the fund document.

**The Allocation Formula to the Church of the Advent from the Advent Foundation**
For years ending September 30, 2005 and thereafter, distributions to the Church of the Advent are calculated as an amount up to (and not to exceed) 5% of the average of the fair market value of the trust assets for the three immediately preceding fiscal years. The fair market value is determined as of the last day of each fiscal year. The distribution rate (i.e., up to 5%) is reviewed and determined by the Advent Foundation Board of Directors annually. This policy is for all funds except those limited by specific trust documents or purposes.
Memorials to The Advent Foundation 2012-2019

* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mr. Jones Ross Albert*  
September 1, 1922 - December 14, 2012

Mr. Charles Raymond Allen, Sr.*  
September 22, 1951 - June 20, 2016

Mr. Augustus Theodore Allen IV  
April 2, 1937 - July 29, 2019

Mr. Robert Watson Allen  
January 25, 1929 - November 19, 2019

Mrs. Elizabeth Carter Ayres  
June 29, 1920 - August 26, 2012

Mr. Philip Jerue Babb  
January 28, 1960 - June 1, 2014

Ms. Laurene Buchheit Babb  
July 2, 1957 - June 18, 2017

Mr. Richard Lamar Bagnal  
November 3, 1948 - April 23, 2018

Mr. Vollie (Vic) Cleveland Bailey, Jr.  
July 6, 1926 - January 26, 2016

Mr. William Donald Bain  
July 1, 1925 - March 15, 2018

Master Henry Thompson Bartee  
June 25, 2014 - June 25, 2014

Dr. Frank Octave Bartel, Jr.  
January 27, 1928 - February 19, 2016

Miss Amy Elizabeth Bauknight  

Mrs. Caroline Keitt Harris Baynard  
July 17, 1925 - December 29, 2007

Mrs. Frances (Happy) Coleman Blackman  
August 9, 1917 - March 15, 2019

Mrs. Lona Jones Blake*  
October 1, 1921 - February 12, 2012

Miss Charlotte Jennings Boggs*  
December 16, 1958 - August 21, 2012

Mr. Erving Weeks Boggs  
October 11, 1948 - February 6, 2019

Dr. Betty Jane Bramlett  
August 7, 1925 - February 1, 2015

Mrs. Virginia Taylor Brandt  
June 2, 1924 - May 28, 2012

Mrs. Clarke Smart Brannon  
July 10, 1954 - August 4, 2019

Mr. Ralph Millard Braswell, Jr.  
March 5, 1929 - September 18, 2018

Amir O'Marion Brewer-Samuel  
November 30, 2002 - August 10, 2019

Mr. Walter Miller Brice III  
August 21, 1933 - March 22, 2019

Mrs. Nancy Cole Bridgeman  
September 16, 1930 - September 11, 2015

Mrs. Angeline (Angie) Talbert Brock*  
May 3, 1937 - March 15, 2014

Mrs. Anne Haskell Lindsey Montague (Nancy) Browne*  
July 14, 1924 - November 27, 2017
Memorials to The Advent Foundation 2012-2019
* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mr. Robert Edward Browne III  
July 4, 1921 - November 8, 2010

Mrs. Evelyn Mae Marshall Bungarz*  
May 23, 1922 - December 8, 2015

Mr. Jesse Milton Buzby, Jr.  
August 31, 1924 - November 13, 2016

The Rev. Withers Waller Caldwell III*  
July 10, 1963 - October 7, 2011

Mr. Robert Grant Calhoun*  
May 28, 1956 - January 8, 2015

Mrs. Frances Boniface Cannon*  
November 2, 1950 - February 24, 2014

Mr. Harold McMillan (Sonny) Cannon  
September 26, 1931 - December 23, 2015

Mr. Ben Montgomery Cart  
April 9, 1929 - February 9, 2018

Mr. John Montgomery Cart*  
March 17, 1925 - January 2, 2017

Mrs. Lynn Allrich Cart  
April 13, 1927 - February 21, 2013

Mr. George “Pat” Edward Case, Jr.*  
September 2, 1925 - September 14, 2017

Mr. George Edward Case III  
March 30, 1954 - April 15, 2018

Mr. Robert L. Chapman  
June 20, 1927 - August 8, 2012

Mrs. Jane Whitaker Clark  
July 10, 1923 - January 30, 2018

Mr. Richard Francis Clark  
September 22, 1937 - November 19, 2016

Mr. E. R. M. (Mac) Coker  
March 10, 1931 - April 9, 2013

Mrs. Margaret Ledbetter Cothran  
December 11, 1928 - April 10, 2019

Mrs. Dicksie Johnston Brown Cribb  
October 13, 1925 - January 30, 2017

Mr. John (Jack) Eli Cribb, Sr.  
April 9, 1930 - March 3, 2015

Mrs. Phebe Anne Crosland  
July 23, 1944 - June 13, 2012

Mrs. Page Arrington Cross*  
July 24, 1927 - June 24, 2012

Mr. Edward Earl "Buddy" Cubitt*  
September 29, 1942 - April 6, 2017

Mrs. Rosalie (Rosie) Price Carlisle Cunningham*  
May 25, 1912 - March 3, 2013

Mrs. Vivian L. Thoma Daab  
December 10, 1928 - March 20, 2014

Mrs. Lois Audrey Daum*  
December 16, 1926 - February 14, 2018

Mr. Frederick Bailey Dent, Sr.*  
August 17, 1922 - December 10, 2019
Memorials to The Advent Foundation 2012-2019

* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mr. Harold Lester Dixon
January 4, 1934 - December 26, 2018

Dr. Roland Windham Doepner, Jr.
September 19, 1937 - August 6, 2019

Mrs. Alta Maxine Dorrance
January 30, 1918 - October 11, 2012

Mrs. Loraine Williams Draper
August 8, 1934 - September 19, 2018

Mrs. Mary Mellon Drozdak*
February 10, 1922 - December 25, 2015

Mrs. Ysabel (Ysal) Dulken
July 22, 1926 - July 23, 2016

Mr. John Floyd Dunbar
November 2, 1926 - December 18, 2012

Mr. Samuel Jervey DuPre, Jr.*
February 25, 1912 - November 3, 2012

Mrs. Kathryn Crosby Easterling
June 17, 1929 - May 13, 2015

Mrs. Betty Ann Hawkins Edge
September 16, 1951 - August 8, 2016

Dr. John Boyd Edmunds, Jr.
November 26, 1935 - December 21, 2016

Mr. James Ross Edwards
November 26, 1941 - January 25, 2018

Mr. Stewart Witney Elliott*
August 28, 1937 - June 5, 2015

Mr. John Roy (Jack) Fant*
January 13, 1918 - November 22, 2016

Mrs. June Heffron Fant*
April 4, 1920 - October 23, 2015

Dr. John A. Feagin, Jr.
May 9, 1934 - September 1, 2019

Mrs. Josephine Pendleton Fenstermacher
November 10, 1911 - August 13, 1999

Mrs. Christine Lawrence Finney
April 1, 1968 - January 5, 2016

Ms. Susan Hall Fisher
January 27, 1960 - September 24, 2016

Mrs. Jane Elizabeth Craddock Flandry
September 17, 1949 - July 23, 2019

The Reverend David Acrill Fort
May 21, 1924 - July 28, 2013

Mrs. Jean Prentice Smith Fort
December 5, 1926 - June 20, 2015

Mrs. Lorelei Caldwell Foster
November 15, 1940 - May 8, 2012

Mr. Eugene Dewey Foxworth III
December 18, 1954 - December 15, 2013

Mrs. Helen Irby France*
March 12, 1922 - December 14, 2014

Mrs. Rose Winkler Fréderic
March 22, 1920 - March 18, 2014

Dr. Thornwell Jacobs Frick*
July 7, 1933 - November 8, 2014
Memorials to The Advent Foundation 2012-2019

* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mr. Herbert Laurence Fritz, Sr.
January 4, 1924 - July 21, 2014

Mrs. Verdier Pinckney Fritz
February 19, 1924 - February 27, 2019

Mrs. Elizabeth Montgomery Oates Gage*
July 17, 1921 - September 15, 2017

Mrs. Irene Cook Goldstein
September 9, 1924 - November 2, 2018

Mr. Robert Carroll Goodpasture
January 5, 1925 - October 29, 2018

Mrs. Peggy O'Dell Green
September 9, 1932 - January 6, 2013

Mrs. Lucy Harper Grier
June 6, 1929 - July 8, 2012

Mr. Cameron Pierce Haar
May 25, 1956 - March 23, 2018

Mrs. Virginia Anne Hall
January 11, 1930 - January 31, 2015

Mr. Robert Alfred Hammett, Sr.*
November 8, 1927 - August 26, 2016

Mr. James Lehman Hamrick
January 12, 1924 - May 23, 2013

Mr. John Allen Hare*
November 17, 1941 - June 23, 2017

Mr. Larry Lee Harken
October 5, 1943 - September 15, 2017

Mr. Philip Guy Harris
November 4, 1899 - September 4, 1975

Mr. Jerry Julienne Harrison
November 5, 1940 - September 27, 2013

Mrs. Eaddy Williams Hayes
January 15, 1924 - May 16, 2011

Mr. Lawson Hayes III*
September 7, 1976 - January 11, 2013

Mr. Robert (Bob) Cates Hayes*
February 23, 1954 - October 20, 2011

Mrs. Teressa (Tess) Gallman Hearn
January 11, 1943 - March 19, 2012

Mr. Charles Robert Heffner
May 15, 1932 - March 22, 1991

Mrs. Betty Sanders Hendrick*
February 28, 1929 - September 11, 2017

Mr. Michael Eugene (Gene) Henline
July 24, 1945 - October 13, 2018

Mr. William Jean (Bill) Henry*
July 22, 1937 - August 13, 2014

Dr. James Thomas (Tom) Hindman
November 5, 1950 - May 7, 2013

Mrs. Katie Adams Hodge*
July 7, 1920 - November 28, 2015

Ms. Martha Wofford Holcombe
June 10, 1947 - December 8, 2015
Memorials to The Advent Foundation 2012-2019
* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mrs. Max Bernard Hollis* 
December 9, 1930 - November 25, 2017

Mr. Julian Thomas Hollis
May 8, 1926 - December 3, 2019

Mr. Joseph Willis Hudson
February 3, 1934 - December 18, 2014

Mr. Stephen Jennings Huntley
September 11, 1933 - June 6, 2016

Mr. William Pinkney (Pinck) Irwin, III*
September 10, 1917 - March 23, 2012

Mrs. Elizabeth "Betty" Fishburne Irwin
August 19, 1924 - January 9, 2019

Dr. Richard Edward Jabour
December 1, 1939 - September 23, 2015

Mrs. Lynn Hope Reed Jackson
May 8, 1924 - August 30, 2013

Dr. James Joseph Jakubchak

Dr. Charles Alston James
August 14, 1929 - January 19, 2014

Mrs. Janice Hudson Janiec*
May 16, 1938 - May 31, 2017

Mr. Caleb (Buck) Brown Jennings, Jr.*
August 22, 1926 - January 6, 2013

Mrs. Patricia (Pat) Herrick Jennings*
December 31, 1928 - June 29, 2012

Mrs. Mary Augusta Elmgren Jessel
August 3, 1920 - February 26, 2018

Ms. Rubie Elaine Jeter
January 16, 1953 - August 20, 2019

Mr. Loy Yates Johnson, Jr.*
January 12, 1937 - December 11, 2016

Mrs. Sarah Frances Sherard Johnson*
December 1, 1939 - September 19, 2013

Mrs. Carolyn Stripling Jolly
August 1, 1949 - April 18, 2014

Mrs. Anne Lucille Harrell Keedwell
February 2, 1919 - December 19, 2012

Mrs. Ann Hultin Kiesau *
March 16, 1941 - September 7, 2017

Dr. Kyle Frank Kiesau
August 11, 1941 - May 12, 2019

Mrs. Frances Taylor King
October 1, 1939 - September 27, 2016

Mrs. Sara Pipkin King
December 14, 1920 - November 22, 2017

Mrs. Clara Jane Knight
August 14, 1928 - April 12, 2013

Mrs. Bennie Stone Larj
April 27, 1923 - July 18, 2019

Dr. John Laurens*
September 14, 1918 - January 3, 2014

Mrs. Diane McElhenney Lee
February 28, 1945 - May 31, 2019
Memorials to The Advent Foundation 2012-2019

* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mr. Donald (Donnie) Paul Lee*  
March 24, 1940 - April 14, 2015

The Reverend Giles Floyd Lewis*  
September 22, 1927 - November 19, 2018

Mrs. Hellen Devue Gentry Lewis  
November 21, 1926 - December 15, 2016

Mrs. Jane Tauber Lewis  
May 26, 1934 - October 28, 2015

Dr. Timothy Scott Llewelyn  
November 6, 1950 - April 11, 2014

Mr. Richard Brady Lowry  
May 6, 1949 - April 11, 2012

Mr. Maxcy Clinton Lynn  
February 29, 1928 - March 9, 2013

Mr. Charles Franklin Lytle, PhD  
May 13, 1932 - October 19, 2015

Mr. Joseph Kenneth Maddox, Sr.  
June 20, 1924 - April 5, 2011

Mrs. Margaret Elise Davis Maddox  
April 23, 1923 - October 1, 2009

Mr. Charles Franklin Lytle, PhD  
July 4, 1920 - April 24, 2016

Dr. Vincent Earl Miller  
October 7, 1921 - March 29, 2017

Mr. Charles Willard Minch*  
September 21, 1942 - June 23, 2012

Mr. George Evans Mitchell*  
December 31, 1934 - May 22, 2012

Mrs. Francis Fleming Patterson Moore  
March 12, 1947 - July 12, 2017

Mrs. Jane Norfleet Smith Morgan*  
November 24, 1914 - January 24, 2013

Mr. Harry Arthur Morris, Jr.  
August 13, 1934 - August 25, 2017

Mrs. JoAn G. Morris  
February 28, 1935 - January 8, 2016

Mr. Liston Lavon Morris  
September 21, 1931 - June 13, 2017

Mr. Carlos DuPre' Moseley*  
September 21, 1914 - October 1, 2012

Mrs. Virginia Manning Moses  
August 28, 1922 - July 7, 2012
Memorials to The Advent Foundation 2012-2019

* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mrs. Caroline Croom Mueller
April 12, 1945 - October 29, 2016

Mr. James Warren Mullen
July 25, 1942 - August 30, 2018

John William Nelson
October 8, 1936 - November 5, 2018

Mrs. Elizabeth Huntley Neuberger*
February 18, 1923 - November 16, 2015

Mr. Frederick Blanton Oates, Jr.*
June 28, 1923 - August 22, 2016

The Rev. W.H.K. Pendleton
January 17, 1867 - December 19, 1956

Mr. Edward Patterson Perrin
September 19, 1925 - May 21, 2015

Mrs. Mary Lee Hammond Phillips
June 25, 1922 - December 15, 2017

Mrs. Kaoru Kodama Pittman
March 3, 1925 - August 6, 2014

Mr. Edgar Lee Pittman, Jr.
September 23, 1952 - September 7, 2018

Mr. Travis Manning Provost
February 15, 1967 - June 3, 2017

Mr. John Stringer Rainey
October 9, 1941 - March 14, 2015

Mrs. Caroline Ragsdale Reutter
March 13, 1951 - July 15, 2017

Ms. Virginia Gee Reynolds

Mr. Deas Manning Richardson
September 14, 1928 - September 7, 2016

Mr. Benjamin Franklin (Frank) Roberts
May 23, 1922 - May 12, 2012

Mr. Frederick Robbins (Fred) Rogers
August 10, 1946 - October 13, 2019

Mrs. Cynthia Audry Boyle Forster
May 15, 1947 - May 16, 2017

Mr. John Lawrence Rudolph
March 21, 1937 - June 23, 2019

Mr. William Reddrick Russell
January 28, 1933 - April 7, 2018

Mrs. Frances Yates Burdell Satterfield
November 9, 1966 - April 15, 2019

Mrs. Laura Jane Kreuger Schwartz
April 1, 1935 - September 19, 2017

Mr. Augustus Waite (Gus) Shoolbred Jr.
December 29, 1926 - August 25, 2013

Mrs. Denise Davis Smith
June 1, 1954 - August 20, 2012

Mr. Frank Wesley Smith*
June 11, 1931 - June 7, 2016

Mrs. Grace Walker Jackson Smith
February 1, 1930 - April 1, 2019

Mrs. Julia Stockton Walker Smith*
November 4, 1930 - June 21, 2014
<table>
<thead>
<tr>
<th>Name</th>
<th>Date Range</th>
</tr>
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<tbody>
<tr>
<td>Mr. Roy McBee Smith, Sr.</td>
<td>November 4, 1928 - January 24, 2006</td>
</tr>
<tr>
<td>Mr. Watt Elias Smith II</td>
<td>September 16, 1934 - September 20, 2017</td>
</tr>
<tr>
<td>Mrs. Carol Rae Doxley Starnes</td>
<td>September 16, 1938 - October 28, 2015</td>
</tr>
<tr>
<td>Robert Brooke Stewart</td>
<td>June 20, 1922 - March 24, 2016</td>
</tr>
<tr>
<td>Mrs. Charlotte Harper (Sissy) Stone*</td>
<td>April 14, 1936 - June 11, 2013</td>
</tr>
<tr>
<td>Mr. George Eliot Stone</td>
<td>October 10, 1934 - December 8, 2019</td>
</tr>
<tr>
<td>Mr. Christopher Talley</td>
<td>November 16, 1978 - February 20, 2015</td>
</tr>
<tr>
<td>Mrs. Elizabeth (Betty) Hamiter Taylor</td>
<td>December 24, 1923 - January 17, 2015</td>
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<tr>
<td>Mr. Jesse Gray Taylor</td>
<td>January 13, 1917 - March 15, 2014</td>
</tr>
<tr>
<td>Mr. George Cameron Todd, Sr.</td>
<td>January 8, 1926 - April 15, 2018</td>
</tr>
<tr>
<td>Mrs. Margaret Cummins Toth*</td>
<td>July 28, 1933 - September 18, 2016</td>
</tr>
<tr>
<td>Mr. W. Dewey Tullis</td>
<td>December 4, 1926 - April 21, 2017</td>
</tr>
<tr>
<td>Mr. John William Wakefield, Jr.</td>
<td>November 1, 1925 - July 31, 2012</td>
</tr>
<tr>
<td>Mr. Dudley (Denny) Jennings Walker</td>
<td>July 1, 1945 - October 20, 2015</td>
</tr>
<tr>
<td>Mrs. Elizabeth Cates Wall</td>
<td>November 7, 1904 - July 13, 1986</td>
</tr>
<tr>
<td>Mrs. Anne Murray Wallace</td>
<td>May 9, 1921 - February 7, 1979</td>
</tr>
<tr>
<td>Mr. John Thompson Wardlaw*</td>
<td>June 18, 1923 - April 15, 2018</td>
</tr>
<tr>
<td>Mrs. Mary Williamson Saunders &quot;Putsy&quot; Wardlaw</td>
<td>January 26, 1935 - April 4, 2019</td>
</tr>
<tr>
<td>Mrs. Frankie Jo Taylor Watson</td>
<td>August 16, 1933 - November 29, 2019</td>
</tr>
<tr>
<td>Mr. Alfred Adair Watters Jr.*</td>
<td>December 14, 1924 - September 25, 2008</td>
</tr>
<tr>
<td>Mr. David Tutherly Watters</td>
<td>March 25, 1957 - November 21, 2018</td>
</tr>
<tr>
<td>Mr. Donald James Welch*</td>
<td>April 9, 1931 - January 22, 2016</td>
</tr>
<tr>
<td>Mrs. Elizabeth (Betty) Cleveland Welch</td>
<td>January 10, 1918 - November 13, 2013</td>
</tr>
<tr>
<td>Mrs. Frances Eaker Willard</td>
<td>April 13, 1921 - April 12, 2014</td>
</tr>
<tr>
<td>Mrs. Edythe Laurell Stephenson Wise*</td>
<td>January 28, 1924 - September 10, 2015</td>
</tr>
</tbody>
</table>
Memorials to The Advent Foundation 2012-2019
* Memorials were invited to the Episcopal Church of the Advent and Foundation

Mr. Robert Wilburn Wise
October 30, 1923 - July 18, 2019

Mr. Emerson Fort Wolfe, Sr.*
April 29, 1929 - August 3, 1998

Mrs. Mary Chase Wolfe*
March 15, 1932 - December 30, 2005

Lt. Col. Samuel Sidney Wood Sr.
April 23, 1915 - July 6, 2013

Mr. James Clower Wright
September 24, 1934 - February 19, 2019

Mr. Thomas Daniel Wyatt, Jr.
October 16, 1934 - August 17, 2017

Mr. Thomas Daniel Wyatt III*
February 12, 1956 - September 27, 2013


<table>
<thead>
<tr>
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<tr>
<td>Bequests</td>
<td></td>
<td></td>
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<td>180,002</td>
<td>141,763</td>
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<td>Memorials &amp; Honoraria</td>
<td>16,187</td>
<td>24,954</td>
<td>33,324</td>
<td>14,702</td>
<td>29,476</td>
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<tr>
<td>Other Additions</td>
<td>11,687</td>
<td>1,540</td>
<td>32,114</td>
<td>1,400</td>
<td>3,000</td>
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<tr>
<td>Lay Pension Funding</td>
<td>20,158</td>
<td>51,478</td>
<td>19,652</td>
<td>39,304</td>
<td>49,130</td>
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<tr>
<td>Total Contributions</td>
<td>$48,033</td>
<td>$77,972</td>
<td>$85,090</td>
<td>$235,408</td>
<td>$223,369</td>
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Number of Memorials
240  366  270  170  362
How to Contribute to the Advent Foundation

Memorial Gifts – Memorial gifts are normally contributed to The Unrestricted Fund, however, gifts to other funds are also welcome. The Foundation will send a letter both to the family and to you acknowledging your gift.

Honorary Gifts – An honorary gift can be made to any fund and the honoree will receive a letter stating that a gift has been received from you to honor them.

Honorary Gifts in 2019: Mr. & Mrs. Dillard W. Copeland, Mr. Reed Ligon Cunningham, Master Rhett Franklin McCraw Jr., The Reverend Jonathan Edward Morris, Mr. Robert William Wyatt.

The Ministry of Planned Giving – Planned Giving encompasses a variety of ways that gifts can be made to the church from accumulated resources. It usually involves financial or estate planning; however, it is not reserved for the wealthy. Planned giving is a means by which anyone concerned with the wise use of his or her personal resources makes a carefully planned choice about their ultimate disposition.

- Planned Giving establishes a way for a donor to provide more for his or her heirs and to make a larger gift than thought possible. It often reduces taxes.
- Planned gifts can be designated for the Advent’s general fund or for its endowment.
- Planned gifts are either outright gifts (i.e., gifts of appreciated securities, real property, personal property, etc.) or deferred gifts (i.e., charitable gift annuities, charitable remainder trusts, pooled income funds, life insurance or bequests in a will).

In general, planned gifts are made through:

- A Bequest in a Will
- A Life Income Gift - a charitable gift annuity, or a charitable remainder trust
- Life Insurance
- A Life Estate - a gift of a home, farm or ranch
- Appreciated Property - real estate or securities
- Through a Retirement Account or IRA proceeds
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The Advent Legacy Society

Established in 2003, the Advent Legacy Society honors those who have remembered The Episcopal Church of the Advent as part of their legacy. Planned giving helps ensure that our mission – “That Christ’s light be seen in us” - continues for generations to come. In addition to supporting the parish’s ministry and mission, planned gifts are a unique way to express your personal values, continue the stewardship of your life, and leave a lasting impact on the lives of others.

All it takes to become a member of the Advent Legacy Society is to inform the Rector or Advent Foundation Executive Director that you have made provision for the Advent in your will or estate planning. Planned gifts of any amount qualify.

Members of the Advent Legacy Society

Mr. & Mrs. William Bagwell
Mrs. Laura Chappell Bauknight
Mrs. Haidee Ballenger Courson
Mr. & Mrs. John B. Dargan
Mr. William B. Ferguson
Mr. and Mrs. Laurence E. Flynn, Jr.
Mr. & Mrs. Stephen I. Johnson
Mr. & Mrs. George Dean Johnson, Jr.
Dr. & Mrs. Julian C. Josey

Mr. J. Michael Kohler,
Mr. & Mrs. J. Michael Kohler, Jr.
Mr. & Mrs. J. Michael Kohler, Jr.
Mr. & Mrs. J. Michael Kohler, Jr.
Mr. & Mrs. J. Michael Kohler, Jr.
Mr. & Mrs. J. Michael Kohler, Jr.

Mrs. Sonia McDuffie
Mrs. George Evans Mitchell
Mr. & Mrs. Walter Scott Montgomery, Jr.
Mr. & Mrs. Larry Edward Moore
Mr. David Pittman
Mr. & Mrs. Warwick Spencer
Mr. & Mrs. Lemuel H. Walker Jr.
# The Advent Foundation

## Board of Directors

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<tr>
<th>Class</th>
<th>Member</th>
<th>Term</th>
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<td>Mac Davis</td>
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<td>Warwick Spencer</td>
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<td>Matthew Myers</td>
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