

ECUMENICAL PATRIARCH
BARTHOLOMEW
FOUNDATION

For the Sacred See of Saint Andrew

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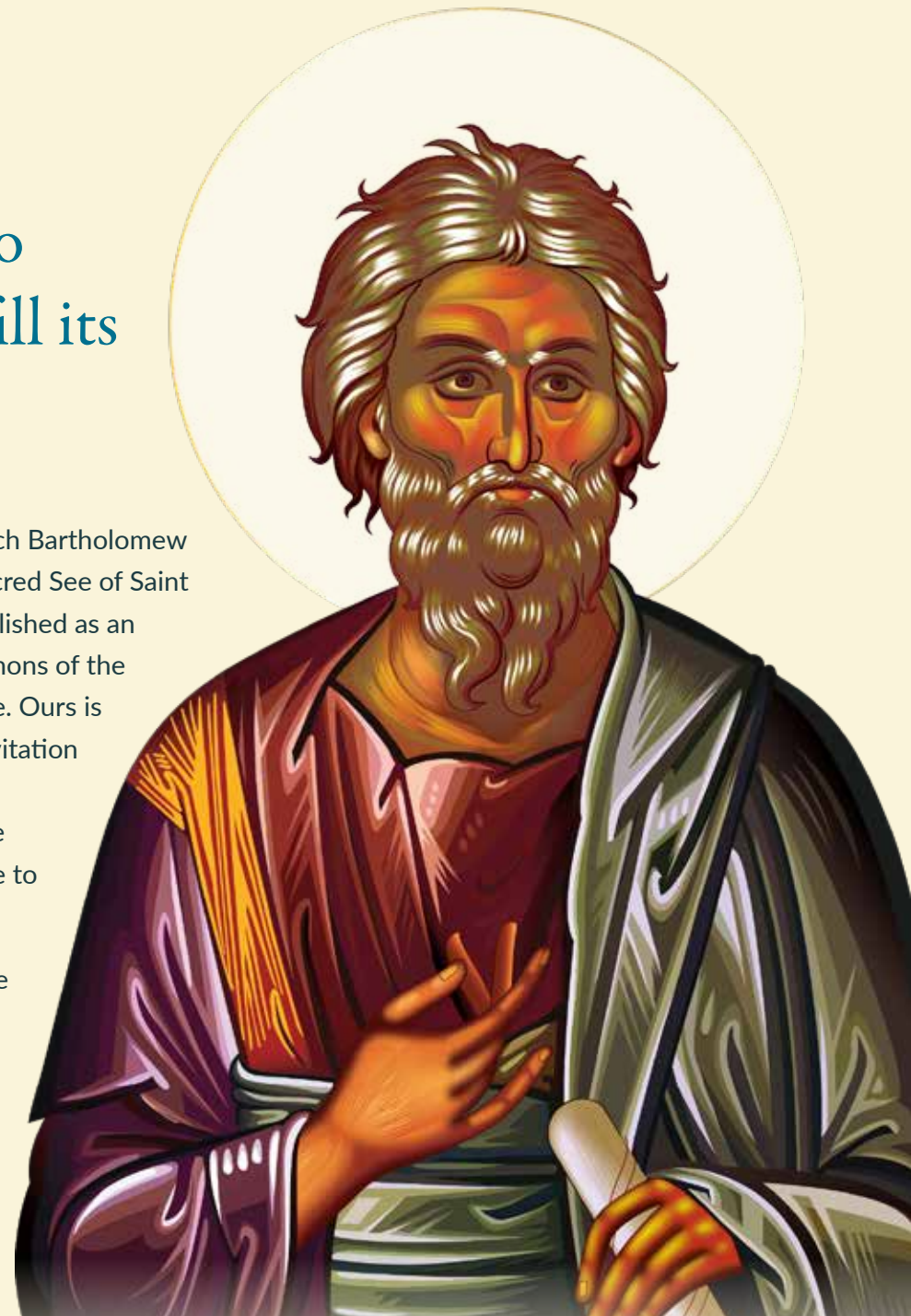
Granting economic independence to the Ecumenical Patriarchate to fulfill its apostolic mission.... in perpetuity.

Established in 38 AD by St. Andrew the Apostle, the Patriarchate of Constantinople is one of the most enduring institutions in the world and has played a prominent part in world history. Through the centuries, the Ecumenical Patriarchate has both guided the expansion, and defended the doctrine, of the Orthodox Christian Faith worldwide. The Ecumenical Patriarch is the first among equals, as articulated in the Second and Fourth Ecumenical Councils of the Undivided Christian Church, and as such is regarded as the representative and spiritual leader of Orthodox Christians around the globe. The Sacred See of Saint Andrew works tirelessly to ensure unity amongst all the Local Orthodox Churches, and actively coordinates intra-Christian and inter-religious dialogues, as well as participating in various charitable and philanthropic endeavors.

The Ecumenical Patriarch Bartholomew Foundation: For the Sacred See of Saint Andrew has been established as an endowment by the Archons of the Ecumenical Patriarchate. Ours is a global mission and invitation for everyone across the various Eparchies of the Ecumenical Patriarchate to be united as one.

Together, we can ensure that the Ecumenical Patriarchate, “the Light – continues to shine in the darkness.”

Saint Andrew the Apostle



HIS ALL-HOLINESS

Ecumenical Patriarch Bartholomew



Elected in 1991, Ecumenical Patriarch Bartholomew's tenure has been characterized by intra-Orthodox cooperation, intra-Christian and inter-religious dialogues. He has worked to defend religious freedom and human rights and advances initiatives that foster tolerance amongst the world's religions, including Muslims and Jews. For nearly 30 years, he has hosted and visited numerous religious and world leaders. His efforts to promote ecological justice and the protection of the environment have been widely noted, earning him the title, "The Green Patriarch."

During his life long diakonia, he has enhanced the relationship between the Orthodox and Catholic Churches with the goal of reconciliation. His ongoing personal relationships with Popes John Paul II, Benedict XVI, and the current Pope Francis led to remarkable ecumenical accomplishments, including the return of sacred relics of Saints John Chrysostom and Gregory the Theologian, his holy predecessors on the Throne of

Constantinople. In 2016, for the first time since the Great Councils, the Holy and Great Council of the Orthodox Church was convened in Crete, under Ecumenical Patriarch Bartholomew's leadership. Then in 2019, the Ecumenical Patriarchate granted autocephaly to the Orthodox Christian Church in Ukraine. When his story is written a generation from now, he will be seen as one of the longest serving and progressive Patriarchs the Christian world has ever known.

However, in spite of his many notable accomplishments, the Ecumenical Patriarchate faces many challenges.

Religious freedom ought to be a right. But for the Ecumenical Patriarchate today, it is a daily struggle. The Ecumenical Patriarchate's Halki Theological School has been closed for half a century on the orders of the Turkish government, and Church properties are continually threatened with seizure. We know these are attempts to extinguish the light which shines from the Phanar.

WE CAN HELP

A Global Initiative

The time has come for Orthodox Christians around the world to come together and ensure that the voice of the Apostolic Throne of Andrew never goes silent and the Spiritual Center of our Faith is able to lead Christ's Holy Church for generations to come. In honor of His All-Holiness Ecumenical Patriarch Bartholomew's upcoming 30th Enthronement Anniversary, we are establishing the Ecumenical Patriarch Bartholomew Foundation as a global initiative to:



GRANT ECONOMIC INDEPENDENCE

Provide financial resources to sustain, in perpetuity, the religious, educational and philanthropic institutions of the Mother Church.



INCREASE ORTHODOX CHRISTIAN PRESENCE ON GLOBAL STAGE

Offer support to the Ecumenical Patriarchate to encourage their presence around the globe. This will increase opportunities for dialogue with various world, environmental, and religious leaders, without being asphyxiated by financial constraints.



FOSTER INCREASED INTER-ORTHODOX DIALOGUE

Supply economic assistance necessary for the Sacred Throne of Andrew to sponsor international conferences and meetings, amongst all jurisdictions, thereby strengthening the unity of the worldwide Orthodox Church.



EXPAND CHARITABLE AND HUMANITARIAN AID

As the Ecumenical Patriarch represents the Orthodox faithful throughout the world, we offer His All-Holiness our prayers and financial support, so he may extend philanthropia on our behalf to those in need.

WAYS TO GIVE

Giving Through Your Will Or Trust

Leaving a gift in your will or revocable living trust is a wonderful way to ensure that your support of the Bartholomew Foundation helps our mission for generations to come.

You may designate a specific dollar amount or percentage of your residual estate to the Bartholomew Foundation, while leaving other assets to your family and friends.

There is no minimum requirement. Every legacy gift makes a difference.

FOLLOW THESE STEPS

- Provide your attorney with the sample language below:

"I give [the residue of my estate], or [___% of the residue of my estate], or [the sum of _____ dollars] to the Ecumenical Patriarch Bartholomew Foundation: For the Sacred See of Saint Andrew, Inc., New York, NY, for its general purposes."

- **Include** this information:

Ecumenical Patriarch Bartholomew
Foundation
8 East 79th Street
New York, NY 10075

Federal Tax ID Number – 83-3599880



"We were taught that you give what you can and we want to send that same message to our children," says George E. Safiol, a founder of the Ecumenical Patriarch Bartholomew Foundation and leader. "That's why we've made a gift of \$100,000 to the Foundation. It's an easy way to leave a legacy of inspiration that will support the sacred ministry of our Mother Church."

George E. Safiol
Archon Archiophylax

WAYS TO GIVE

Giving By Beneficiary Designation

RETIREMENT ACCOUNTS AND IRAS

Naming the Bartholomew Foundation as a beneficiary of a retirement plan account or IRA is a smart way to give and save on your family taxes. Withdrawals from retirement accounts are usually fully taxable, no matter who receives the funds. That is, unless you designate a tax-exempt entity like the Bartholomew Foundation as a beneficiary.

Because the Bartholomew Foundation is tax-exempt, 100 percent of your retirement account or IRA gift will go towards creating your legacy.

CERTIFICATES OF DEPOSIT, BANK & BROKERAGE ACCOUNTS, LIFE INSURANCE

Another simple way to have a lasting impact is to name Bartholomew Foundation as beneficiary of a certificate of deposit, bank or brokerage account or life insurance policy.

DONOR-ADVISED FUNDS

Consider naming the Bartholomew Foundation as a beneficiary of any contributions remaining in your donor-advised fund. Or, designate the Bartholomew Foundation to receive a portion of the remaining account value, leaving the balance for your family or friends to continue your legacy of philanthropy.

FOLLOW THESE STEPS:

- **Contact** your retirement plan or IRA administrator, bank or insurance company and request a beneficiary form.
- **Write** "Ecumenical Patriarch Bartholomew Foundation, New York, NY, Federal Tax ID Number 83-3599880" as a sole or partial beneficiary of your account.
- **Sign and return** (or file online) the form to your plan administrator and keep a copy for your files.
- **Share** a copy with the Bartholomew Foundation.

Create Your Legacy Today With A Charitable IRA Rollover Gift

DID YOU KNOW....

If you are age 70 ½ and older, you can make direct charitable contributions from your IRA (Individual Retirement Account) to the Bartholomew Foundation without any tax consequences?

As you may be aware, all IRA withdrawals are fully taxable. A new law, however, makes it possible to direct up to \$100,000 to the Bartholomew Foundation or other nonprofit organizations a year with no income taxes being charged. These **Charitable IRA Rollover gifts** additionally fulfill your annual IRA required minimum distribution and allow non-itemizers to receive tax benefits from gifts to the Bartholomew Foundation.

To use the **Charitable IRA Rollover** provision to make an immediate impact with the Bartholomew Foundation:

- You must be age 70 ½ or older
- The funds must go directly from your IRA account to the Bartholomew Foundation
- You cannot exceed \$100,000 in Rollover gifts a year
- Rollover gifts must be unrestricted and cannot provide any incidental benefits to the donor.



“Steve and I can’t think of a better way to ensure that the voice of the Mother Church never goes silent and the Spiritual Center of our Orthodox Christian Faith is able to lead Christ’s Holy Church for generations to come than by investing in the future of the Bartholomew Foundation.” Frosene Zeis, who, with her husband Archon Steve, made a significant commitment in their Living Trust to the Ecumenical Patriarch Bartholomew Foundation.

Frosene and Steve E. Zeis
Archon Skevophylax

For more information about this exciting new way to give, please contact Jonathan Gudema, Esq., 917-817-7989 or jgudema@bartholomew.foundation at the Bartholomew Foundation or reach out to your IRA plan administrator.

WAYS TO GIVE

A Gift That Pays You And/Or A Loved One Income For Life

When you create a charitable gift annuity to benefit the Bartholomew Foundation, you and/or a loved one receive guaranteed fixed quarterly payments for life based on your age(s) and a charitable income tax deduction in the year of the donation.

You receive the annuity income for life and the remaining funds after your passing to establish your legacy with the Bartholomew Foundation

YOUR KEY BENEFITS

- Establishing a gift annuity with appreciated stock may reduce capital gains.
- A gift annuity is a creative way to meet the long-term financial needs of a spouse or another loved one.
- If you want immediate tax savings but don't need payments until later, you may choose a deferred annuity.
- A portion of your annuity payments is tax-free.
- The older you are when your annuity begins, the higher your payment rate.

FOLLOW THESE STEPS

- **Request** a personalized illustration of your gift annuity options. Contact Jonathan Gudema, Esq., 917-817-7989 or jgudema@bartholomew.foundation at the Bartholomew Foundation.
- **Minimum** Gift Annuity to benefit the Bartholomew Foundation is \$20,000 and minimum age(s) is 65.
- **Sign and return** a simple contract.
- **Receive** fixed quarterly payment for the rest of your life or the lives of up to beneficiaries.

Current Charitable Gift Annuity Rates			
Single Life		Two Lives	
Age	Rate	Ages	Rate
70	4.7%	70	4.2%
75	5.4%	75	4.6%
80	6.5%	80	5.4%
85	7.6%	85	6.5%
90 and older	8.6%	90 and older	8.2%



For more information or to request a personalized illustration, please contact Jonathan Gudema, Esq., 917-817-7989 or jgudema@bartholomew.foundation at the Bartholomew Foundation.

Bartholomew Foundation Legacy Society

The Bartholomew Foundation honors your commitment and legacy, and commitment to enabling the Bartholomew Foundation to continue our Global Initiative for generations to come.

In recognition of your generosity and commitment, we welcome you to the Bartholomew Foundation Legacy Society and a lifelong relationship with the Bartholomew Foundation. This group of dedicated philanthropists share a common vision in our fight for the Mother Church, for today and tomorrow.

As a Society member, you'll hear first about our latest initiatives and emergent campaigns, and be included in special briefings and events.

Your gift will be noted in the Bartholomew Foundation Annual Report, or you may choose to remain anonymous.

Legacy Giving Benefits For You

Most legacy giving opportunities enable you to:

- Retain control of your assets during your lifetime
- Change your beneficiaries at any time
- Provide for loved ones and the Bartholomew Foundation
- Make your gift in honor or memory of someone special
- Leave a lasting impact with any size gift



For more information, please contact Jonathan Gudema, Esq., 917-817-7989
or jgudema@bartholomew.foundation

ARCHBISHOP OF CONSTANTINOPLE AND NEW-ROME

A Globally Recognized Leader



Ecumenical Patriarch welcoming Joe Biden to the Phanar.



Recipient of the Congressional Gold Medal with record number of votes.



Archons with His All-Holiness during pilgrimage to Constantinople.



Participating in the International Summit of Leaders of Change in Istanbul.



Granting the Tomos of Autocephaly to the Church of Ukraine.



Prayers during an environmental symposium, "The Arctic: Mirror of Life" in Greenland.



We Are Here to Help

There are many ways to give. The Bartholomew Foundation has the experience to guide in considering the options described in this brochure, and other gifts, such as real estate or charitable trusts.

We encourage you to discuss this important process with your loved ones and financial and legal advisors.

To tell us about a gift you have planned or to explore the best legacy giving options for you and your family, please contact Jonathan Gudema, Esq., 917-817-7989 or jgudema@bartholomew.foundation for more information regarding these and any other giving methods.

www.bartholomew.foundation

The Patriarchal Cathedral of Saint George.





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The Ecumenical Patriarch Bartholomew Foundation: For the Sacred See of Saint Andrew Incorporated is a 501(c)(3) nonprofit institution recognized by the IRS as a public charity.