

## Contact Information:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

***Please mark the option  
that best fits your situation.***

\_\_\_\_\_ I am already a member of the Guild. St. Joseph Parish is already named as a beneficiary of my planned giving.

\_\_\_\_\_ Please enroll me in the St. Joseph the Worker Guild. I will be including St. Joseph Parish in my planned giving through estate planning or as a beneficiary.

\_\_\_\_\_ Please provide me with more information about making planned gifts to St. Joseph Parish through my will or other means.

*Bring this form to the parish office or drop it in the offertory baskets at Mass. A parish staff member will follow up with more information.*

THIS INFORMATION IS STRICTLY CONFIDENTIAL



SCAN THIS CODE  
TO FILL OUT THIS  
FORM ONLINE.



### Celebration and Recognition

Each year around the feast of St. Joseph the Worker, May 1st, the pastor of St. Joseph cordially invites those who are members of the St. Joseph Guild or those in the process of discerning their gift, to an evening reception. It is a chance to thank the members of the Guild and to educate in any of the new ways to leave a legacy gift.

This reception is an annual reminder to the parish community of the importance of giving even after our earthly life is complete. More information about this celebration and recognition reception will be in the bulletin. You may also call the parish office for more details.



*The St. Joseph the Worker Guild offers parishioners the opportunity to continue their good work and offertory to the parish even beyond their earthly life. The Guild honors those parishioners who have named St. Joseph Parish in any of the various options of Planned Giving.*

*Each of you should give what you have decided in your heart to give, not reluctantly or under compulsion, for God loves a cheerful giver.  
-2 Corinthians 9:7 (NIV)*

**St. JOSEPH**  
CATHOLIC CHURCH

Church Address:  
226 N. Hill Street  
South Bend, IN 46617

Ackles Parish Life Center:  
711 E. Colfax Ave.  
(574)234- 3134  
stjoeparish.com

## The History of the St. Joseph the Worker Guild, Its Present, and Future

The Guild was created under the leadership of Fr. Anthony 'Tony' Szakaly pastor of St. Joseph Parish in Spring 2003. Fr. Szakaly stated, "Membership in the Guild will be extended to parishioners who have prayerfully decided to remember our parish in their will. It doesn't matter if the gift is large or small. Many people think that only the wealthy have large enough estates to be able to leave a gift. Others think that they are too young to begin to plan their estate. But, in reality every little bit helps. Even a small percentage of a small estate can enable our parish to do wonderful things."

The year 2023 will commemorate the 20th anniversary of Fr. Szakaly's founding of the St. Joseph the Worker Guild. His mission continues to fuel and build the future of St. Joseph Parish. We invite you to prayerfully consider how you and your family can give of your gifts back to the Lord through the St. Joseph the Worker Guild.

### **Why St. Joseph the Worker?**

I deliberately chose St. Joseph the Worker as patron because what God has called each of us to do through our baptisms is indeed work. St. Joseph knew that all comes from God and that all must go back to God...though not a rich man, he provided for Jesus and Mary by the sweat of his brow and his deep love for them. The St. Joseph the Worker Guild offers you the chance to continue your good works in thanksgiving to God as you enter into the promise of our faith, eternal Life in the Kingdom of Heaven.

-Fr. Tony Szakaly April 26, 2004



## **Basic Estate Planning**

Everyone should have an estate plan which provides directives of what happens upon your incapacitation and death. Without an estate plan, the state will decide who gets your assets upon your death and when they get them. Estate planning can include a will; a trust; and financial and health care powers of attorney. To determine what is best for you, you should consult an estate planning attorney. If you are planning on giving a portion of what you own to a charity, please consider St. Joseph Parish as part of your estate plan.

### **Frequently Asked Questions:**

#### ***Is it necessary to speak with a lawyer?***

It is not necessary to speak with a lawyer to change or name a beneficiary. Many are simple to change by going online or calling and adding a beneficiary.

Wills and Trusts, on the other hand, often require you to speak with a lawyer to set up and manage.

#### ***Why would I name a charity in my planned giving and not a family member?***

Family circumstances are unique. One may choose to bequeath all assets to next of kin, a family member or relative. Some may decide to give a percentage to charity, while some families may decide to give all assets to a charity like St. Joe. Prayer, discernment and family conversations are important when deciding what and how much to give and to whom.

#### ***What if I don't have a lawyer, does the parish recommend one?***

There are many lawyers in South Bend that specialize in estate planning. Take a look at the back of the bulletin for possible firms. The parish will not recommend lawyers so as to avoid partiality.

#### ***May I come to the St. Joseph the Worker Guild Receptions even if I haven't named St. Joe as a beneficiary?***

You may, but we ask that you come with an open mind and be in a disposition of active discernment in naming St. Joseph Parish in your planning giving.

For more information contact:  
Tim Cleaver  
Director of Stewardship  
email: [tcleaver@stjoeeparish.com](mailto:tcleaver@stjoeeparish.com)  
Phone: (574) 234-3134 x 122



## **Planned Giving to St. Joseph Parish**

**Specific Bequest-** you can designate a certain amount of cash or specific asset to the parish.

**Residual Bequest-** you can plan for the parish to receive all or a portion of your estate after other specific bequest have been distributed.

**Percentage Bequest-** you can designate a certain percentage of the estate to go to the parish.

**Contingent Bequest-** you can make the parish the recipient of a bequest if others named in your will are not living at the time of your death.

**IRA Distribution-** name St. Joseph Parish as a charity when your IRA retirement funds are distributed to avoid them being taxed.

**Transfer Upon Death-** done at a financial institution, if St. Joseph is named, then all (or a percentage) of assets held, will be transferred to the parish upon your death.

**Endowments-** The Catholic Foundation of Northeast Indiana manages endowments for the parish for specific funds. You may set up a specific endowment for a particular cause such as a graduating 8th grader, church maintenance, or a particular ministry.

