



CONTACT US TO LEARN MORE:



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PLANNED GIVING



BENEFICIARY DESIGNATION GIFT

If you have already designated us as a beneficiary of an asset or as part of your estate plan, please let us know. We would like to recognize you and your family for your gift.

HOW A BENEFICIARY DESIGNATION GIFT WORKS

- To make your gift, contact the person who helps you with your account or insurance policy, such as your broker, banker, or insurance agent
- Ask them to send you a new beneficiary designation form
- Complete the form, sign it and mail it back to your broker, banker or agent
- When you pass away, your account or insurance policy will be paid or transferred to Catholic Charities, consistent with the beneficiary designation

BENEFITS OF A BENEFICIARY DESIGNATION GIFT

- Support the causes that you care about
- Continue to use your account as long as you need
- Simplify your planning and avoid expensive legal fees
- Reduce the burden of taxes on your family
- Receive an estate tax charitable deduction

BEQUEST

A bequest is one of the easiest gifts to make. With the help of an attorney, you can include language in your will or trust specifying a gift to be made to family, friends or Catholic Charities as part of your estate plan, or you can make a bequest using a beneficiary designation form.

HOW TO LEAVE A BEQUEST TO CATHOLIC CHARITIES

- Include a bequest to Catholic Charities in your will or revocable trust
- Designate Catholic Charities as a full, partial or contingent beneficiary of your retirement account (IRA, 401(k), 403(b) or pension)
- Name Catholic Charities as a beneficiary of your life insurance policy

BENEFITS OF A BEQUEST

- Receive an estate tax charitable deduction
- Reduce the burden of taxes on your family
- Leave a lasting legacy to charity

LIFE ESTATE TRUST

You may desire to leave your home or farm to Catholic Charities at your death but would also like to receive a current charitable income tax deduction. A life estate trust might offer the solution you need.

HOW A LIFE ESTATE TRUST WORKS

- Deed your home or farm to Catholic charities. The deed will include a provision that gives you the right to use your home or farm for the rest of your life
- You and Catholic Charities sign a maintenance, insurance and taxes (MIT) agreement to explain that you will maintain property insurance and pay the property taxes
- When the owners of the life estate trust have passed away, your home or farm will belong to Catholic Charities

BENEFITS OF A LIFE ESTATE TRUST

- Receive a federal income tax deduction for the value of the remaining interest in your home or farm
- Preserve your lifetime use and control of your home or farm
- Create a life estate based on more than one life. This will preserve the use of the property for you and a loved one, such as a spouse or dependent child

CONTACT US

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For more information about Planned Giving visit www.ccstcloud.org