

Methods of Giving

Types of Gift	Form of Gift	Benefit to Church	Benefit to You
Outright Gift	<ul style="list-style-type: none"> • Cash • Stocks/securities • Real estate • Insurance 	<ul style="list-style-type: none"> • Perpetual income • Interest income use by parishes, schools and organizations in diocese 	<ul style="list-style-type: none"> • Income tax deduction • No capital gains tax on Appreciated gifts
Bequest	<ul style="list-style-type: none"> • Cash • Real estate • Personal property • Percentage of estate • Remainder of estate 	<ul style="list-style-type: none"> • Bequest will be held in Perpetuity and invested to Fund Church needs as designate by the donor 	<ul style="list-style-type: none"> • Possible estate tax deduction • Opportunity to make a perpetual gifts
Charitable Gift Annuities	<ul style="list-style-type: none"> • Cash • Stocks/securities • Real estate 	<ul style="list-style-type: none"> • Upon the death of the donor or last surviving annuitant remaining assets generate interest income for the Church 	<ul style="list-style-type: none"> • Possible estate tax deduction • Opportunity to make a perpetual gift
Insurance Policies	<ul style="list-style-type: none"> • Name The Foundation as policy owner and/or beneficiary 	<ul style="list-style-type: none"> • The Foundation receives full face value of policy upon death of the donor, or may receive current surrender value prior to donor's death 	<ul style="list-style-type: none"> • Opportunity to make substantial future gift to Church at current manageable cost • Income tax deduction for value of the policy when transferred • Premium payments may be deducted as gifts
Charitable Remainder Trusts	<ul style="list-style-type: none"> • Cash • Stocks/securities • Real estate 	<ul style="list-style-type: none"> • The Foundation receives substantial future gift to support the work of the Church and the charities named by the donor 	<ul style="list-style-type: none"> • Variable or fixed income • Option to defer income • Income tax deduction • Reduction of estate taxes • No capital gains tax on appreciated gift (or deferred in some instances)
Charitable Lead Trusts	<ul style="list-style-type: none"> • Cash • Stocks/securities • Real estate 	<ul style="list-style-type: none"> • Income for duration of trust helps Church meet spiritual and human needs that exceed the capabilities of most parishes, schools and organizations 	<ul style="list-style-type: none"> • At end of trust period, principal returns to donor or heirs • Principal can pass to others with little or no shrinkage • Tax deduction
Retirement Plan/IRA	<ul style="list-style-type: none"> • Name The Foundation as beneficiary of death benefit 	<ul style="list-style-type: none"> • Significant gift upon death of donor 	<ul style="list-style-type: none"> • Opportunity to make a major gift • Estate and income tax savings