

WE ALL WANT SIGNIFICANT, HAPPY AND FULFILLED LIVES

We want to make a difference and leave a lasting mark for those most dear to us and to the world.

WHAT LEGACY WILL YOU LEAVE?

A bequest is perhaps the easiest way to make a lasting impact on people and organizations that mean the most to you. A bequest is an easy and effective way to gift a charity.

AN EASY GIFT TO MAKE

A charitable bequest directs a gift to be made to charity when you pass away. It benefits you in furthering the good work of an organization you support long after your lifetime; you can save estate taxes with a charitable deduction.

This information is not intended as tax, legal or financial advice. Consult your personal financial advisor for information specific to your situation.

FOR MORE INFORMATION

- I have already included the church in my will.
- I would like to speak with someone who can provide additional information.
- I would like to receive information on other charitable tax planning options.

Name _____

Street _____

City _____

State/Zip _____

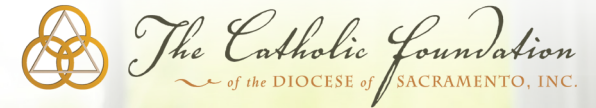
Phone _____

Email _____

Parish _____

Please complete and return to the address listed below. All inquiries are treated with complete confidentiality.

Manager, Donor Relations and Parish Services
The Catholic Foundation of the
Diocese of Sacramento, Inc.
2110 Broadway, Sacramento, CA 95818
(916) 733-0266 | www.tfcgagift.org



HELP TO FULFILL YOUR LASTING
LEGACY: WITH A

Charitable Bequest





Treasures in Heaven

“Do not store up for yourselves treasures on earth, where moths and vermin destroy, and where thieves break in and steal. But store up for yourselves treasures in heaven, where moths and vermin do not destroy, and where thieves do not break in and steal. For where your treasure is, there your heart will be also.”

Matt 6:19-21

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift to be made to family, friends or a charity, such as your parish or parish school.

WAYS TO MAKE A BEQUEST

- ▶ Percentage of your estate
- ▶ Specific dollar amount
- ▶ Specific asset
- ▶ Residue of your estate

HOW DO I INCLUDE THE CHURCH IN MY WILL?

As with any legal document, the proper language is essential:

I give to “Parish Name”, a California nonprofit Corporation, located at “Parish Street Address, City, State, Zip” Dollars (\$ _____)

Alternate 1:
property or assets herein described

Alternate 2:
___ (___%) of the residue of my estate

Alternate 3:
all the residue of my estate.

This gift shall be used for the benefit of (name of parish, school, organization or endowment) for the following purpose _____.

Including a bequest in your will or trust will support your estate plan, and through your charitable bequest you will leave a lasting mark.

As you steward your gifts we ask that you consider your parish or favorite parish ministry. Here are some common ways to make a bequest:

BEQUEST OF AN IRA

An IRA account makes an excellent bequest to charity. If the IRA were given to your family, much of the value would be depleted through estate and income taxes. By designating a charity as the beneficiary of part or all of your IRA, the full value of the gift is transferred tax free at your death and your estate receives a charitable deduction.

BEQUEST OF A LIFE INSURANCE POLICY

A life insurance policy is an easy way to make a bequest to charity. It is free and easy to name a charity as a beneficiary of a life insurance policy.