

SPONSORED

CREATE YOUR CATHOLIC LEGACY WITH A PLANNED GIFT

What is a Planned Gift?

The goal of Planned Giving is to help create and follow a personal plan for estate and charitable giving in a way that benefits you, your family and charity. A planned gift is any charitable gift made during your lifetime, or at death, as part of a donor's overall Estate Plan. These can be gifts of cash, life insurance, real estate, retirement funds (e.g., IRA or IRA RMD), appreciated stock or other personal property. These gifts use estate and tax planning to provide for charity and heirs in ways that maximize the gift and save (or avoid) taxes.

What are the Types of Planned Gifts?

- Outright Gifts that are made while you are living. These include appreciated assets. These gifts often provide a significant income tax deduction and capital gains tax savings to the donor. Gifts of IRAs and annual gifts of IRA Required Minimum Distributions (RMDs) provide income tax advantages. Donors typically receive a charitable deduction for the full market value of the asset.
- Charitable Bequests are gifts made upon death.
- Gifts providing Income or Financial Benefits to the donor in return for the donation, e.g., Charitable Remainder Unitrusts.

The Importance of our Catholic Faith

The purpose of our Catholic faith is to provide us with all the knowledge and role models we need to reach the Kingdom of Heaven. It is our responsibility to receive the sacraments and to live by the values Jesus taught us to achieve eternal salvation. What other institution has been with us from our birth until our eventual passing?



Catholics are Good Stewards

As Catholics, we are called to be good stewards of the many gifts and blessings given to us by God. We recognize that everything we have is a gift from God and that we are merely stewards of God's gifts. We have the responsibility to gratefully give back to God in proportion to the gifts we have received.

What is Estate Planning?

Simply put, Estate Planning is what you want done with what you own. It can be fairly easy to accomplish. The first step is making an inventory of what you own and then meeting with an Estate Planning attorney. The 4 key elements of an Estate Plan are (1) a Will, (2) a Trust, (3) a Financial Power of Attorney and (4) a Catholic Healthcare Directive.

Catholic Estate and Legacy Planning Seminars and Webinars

Your Catholic Community Foundation offers quarterly Catholic Estate and Planning Seminars. Because of the Covid pandemic, these seminars have been

offered in an interactive Zoom webinar format. In these seminars, you will learn about creating or updating the 4 key parts of an Estate Plan. At the conclusion of each seminar, attendees are provided with an opportunity to meet (in person or virtually) with a vetted and practicing Catholic Estate attorney to discuss your Estate Plan needs. These consultations are complimentary. As a good Catholic steward, who fully recognizes the importance of their Catholic faith, prayerfully consider adding your favorite Catholic charities, including your parish, to your Estate Plan. Please see ad below for details.



CATHOLIC ESTATE AND LEGACY PLANNING WILLS AND TRUSTS

The Catholic Community Foundation of San Diego provides information sessions led by local Catholic estate planning attorneys to help you protect and provide for your loved ones, update or create your estate plan, and learn more about wills, trusts, advanced Catholic healthcare directives, financial power of Attorney, probate expenses, guardianship of minor children, selection of personal representatives, and more.

Take steps to protect those you love with a new or updated estate plan. Through proper planning, the legacy of love and care that you leave for your family and friends can be encouraging and even inspiring.

PLEASE JOIN US FOR OUR WILLS & TRUSTS ESTATE PLANNING WEBINAR BY VISITING OUR WEBSITE AT www.ccfdsd.org/ongoing-events/wills-trusts AND SELECT THE BEST DATE AND TIME FOR YOU.

ADMISSION IS FREE.

For more information go to www.ccfdsd.org or call **Teresa Murphy** at (858) 397-9705

To register go to www.CCFSD.org/events

or scan QR code to register on your phone.



Wills and Trusts Week sessions are for informational purposes only and not intended to replace legal advice.

CATHOLIC WILLS & TRUSTS WEBINAR

- **Monday** May 24th 10am-12pm
- **Tuesday-SPANISH** May 25th 10am-12pm

- **Wednesday** May 26th 10am-12pm & 6pm-8pm
- **Thursday-SPANISH** May 27th 6pm-8pm
- **Friday** May 28th 10am-12pm