



THE FOUNDATION WELCOMES THE OPPORTUNITY TO WORK WITH DONORS AND THEIR PROFESSIONAL ADVISORS TO ACHIEVE THE DONOR'S INDIVIDUAL PHILANTHROPIC GOALS.

## WAYS TO GIVE

TYPE OF GIFT	FORM OF GIFT	POTENTIAL BENEFIT TO YOU – THE DONOR	BENEFIT TO FOUNDATION MINISTRIES
<b>Outright Gift: Unrestricted</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Insurance</li> <li>• Real Estate</li> <li>• Personal Property, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Charitable tax deduction</li> <li>• Avoidance of capital gains tax</li> <li>• Opportunity to make a gift to a designated ministry(ies)</li> </ul>	<ul style="list-style-type: none"> <li>• Immediate benefit to ministry(ies) of donor choosing (or Foundation may choose)</li> </ul>
<b>Outright Gift: Endowment</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Insurance</li> <li>• Real Estate</li> <li>• Personal Property, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Charitable tax deduction</li> <li>• Avoidance of capital gains tax</li> <li>• Opportunity to make a gift to a designated ministry(ies)</li> <li>• Honor a loved one</li> </ul>	<ul style="list-style-type: none"> <li>• Ongoing support to donor designated ministry(ies)</li> <li>• Opportunity for beneficiaries to participate in philanthropy</li> </ul>
<b>Charitable Gift Annuity</b> <i>\$10,000 minimum contribution</i>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> </ul>	<ul style="list-style-type: none"> <li>• Guaranteed cash flow for life at rates higher than bank CDs</li> <li>• Portion of cash flow is tax-free</li> <li>• Charitable tax deduction plus possible reduction of taxable estate</li> </ul>	<ul style="list-style-type: none"> <li>• Upon end of donor life or end of contract, remaining assets support parish, school or designated ministry(ies)</li> </ul>
<b>Donor Advised Fund</b> <i>\$5,000 minimum contribution</i>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Insurance</li> </ul>	<ul style="list-style-type: none"> <li>• Donor recommends recipient ministries</li> <li>• Advice in determining appropriate ministry(ies)</li> <li>• Charitable tax deduction, reduction of taxable estate</li> </ul>	<ul style="list-style-type: none"> <li>• The Foundation receives gift for immediate and future use</li> <li>• Opportunity for beneficiaries to participate in philanthropy</li> </ul>
<b>Charitable Remainder Trust</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Real Estate</li> <li>• Any appreciated property</li> </ul>	<ul style="list-style-type: none"> <li>• Donor receives income stream</li> <li>• Charitable tax deduction</li> <li>• Reduction of taxable estate, plus avoidance of capital gains tax</li> </ul>	<ul style="list-style-type: none"> <li>• Upon end of donor life, remaining trust assets support designated ministry(ies)</li> </ul>
<b>Bequest: In Will or Trust</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Personal Property, etc.</li> <li>• Percentage of estate</li> <li>• Remainder of estate</li> </ul>	<ul style="list-style-type: none"> <li>• Reduction of taxable estate</li> <li>• Create legacy honoring a loved one</li> <li>• Opportunity to designate ministry(ies)</li> </ul>	<ul style="list-style-type: none"> <li>• Funds designated ministry(ies) (or Foundation may choose if unrestricted)</li> </ul>
<b>Life Insurance</b>	<ul style="list-style-type: none"> <li>• Name the Foundation as policy owner and/or beneficiary</li> </ul>	<ul style="list-style-type: none"> <li>• Future gift at manageable cost</li> <li>• Charitable tax deduction</li> </ul>	<ul style="list-style-type: none"> <li>• The Foundation receives full face value of policy upon death of the donor, or current surrender value</li> </ul>
<b>Retirement Plan / IRA / Annuity</b>	<ul style="list-style-type: none"> <li>• Name the Foundation as beneficiary</li> </ul>	<ul style="list-style-type: none"> <li>• Donor maintains control during life, avoids tax at death</li> <li>• Opportunity to designate ministry(ies)</li> </ul>	<ul style="list-style-type: none"> <li>• Upon end of donor life, immediate support of Foundation ministry(ies)</li> </ul>