

## Planned Giving

### Suggested Bulletin Announcements

The following paragraphs can be used in your church bulletin.

We suggest they be used in rotation, perhaps one each issue or periodically. Revise them to suit your particular needs.

1. Have you made your Will? The State of Missouri has made one for you – which may not distribute your estate according to your wishes. For your protection and the security of your heirs, consult an attorney about making your Will.
2. Does your husband have a Will? If not, you as wife and mother may be risking a great loss of financial security. Get his Will prepared today and write one for yourself.
3. Does your wife have a Will? In the event of a common disaster, the courts will look to your wife's Will in the distribution of your estate. Be prepared; get her Will written.
4. Have you remembered the good works of the Church in your Will? A bequest of part of your estate or for a stated amount of \$1,000, \$5,000, \$10,000, will ensure that the works of the parish will continue after your death.
5. Life insurance policies assigned to a parish can mean substantial gifts. They are easy to assign and avoid taxes and estate complications. Do you have an insurance policy to assign your parish?
6. Does your Will include (school)? We know that your life is better because you graduated from a Catholic school. Let us provide that same quality religious education to more and more students. Consider a bequest to (parish/school).
7. We have drawn spiritual and academic life from our parish and Catholic schools. What return will we make of these gifts? As the good steward of the Gospel, shall we give to God sufficient return for our gifts? Consider a life culminating gift through your Will.
8. Religious education of young people is vital to the strength of the church. Make a provision in your will for religious education at (parish/school).
9. Programs for young adults and senior citizens are important at (parish). Assure the continuation of these programs by a bequest in your Will.
10. Catholic education must continue to be available to young people. Help provide that opportunity by making a bequest in your Will for Catholic education at (parish/school).
11. Who will take your place as a generous benefactor to (parish)? A memorial gift in your Will could continue your generosity after death.
12. Your generosity during your lifetime has enabled (parish) to serve the people of God in this community. Continue to be a part of the strength of this community by making a bequest in your Will to (parish).
13. A bequest in your Will is important for the future of (parish). If everyone made a gift of \$1,000, we would be assured of being able to continue our services to the community.
14. You need not redo your entire Will to make a provision for a charitable bequest to (parish). See your attorney about preparing a Codicil (a written change or addition), have it witnessed and attached to your Will. Add a gift to

your parish in your Will.

15. (Parish) will be faced with some major capital improvement to our buildings in the years ahead. You can help us to provide adequate facilities, in good repair, through a gift in your Will for this purpose.

16. Have you ever considered purchasing a paid-up life insurance policy naming (parish) as the beneficiary? It could provide a very substantial gift for a small investment on your part. Talk with your agent.

17. Over 50% of all adults neglect to make out a Will; many do not keep it up to date. Think about getting your Will done or reviewed. You will be doing your heirs a service. And consider helping (parish) through a bequest.

18. Don't give away your hard earned estate dollars through taxes and other administrative costs by not having a valid, up-to-date Will. Your Will simply and legally provides a plan for distributing your hard-earned estate. Write one soon.

19. Stocks and bonds, especially if appreciated in value over the years, can cost you or your heirs a lot of capital gains taxes, but they can also make substantial gifts to (parish). Consider such a gift.

20. Assets in your IRAs may be taxed at the income tax rate of your surviving beneficiaries other than your spouse. Please consider naming (parish) as the beneficiary of your appreciated IRA assets so that you avoid this income tax.

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### **Suggested Bulletin Announcements for Special Will Provisions**

1. You can have an everlasting influence on the lives of families in our parish. Please contact your attorney and instruct him or her to include a bequest for our parish in your will.
2. "My weekly offertory isn't much," but my estate can make a one-time gift at my death in a way that I couldn't while alive. "In thanksgiving for the faith I received at (insert parish) I bequeath....."
3. Have you included (name of parish) in your will?
4. Instruct your life insurance agent to include our parish as a primary or secondary beneficiary on your policies.
5. Name Us Last. In your will after all your family and friends have been taken care of, name our parish as recipients of the residuary (the amount that is left).
6. Making a will isn't expensive! But not having one may cost your family a great deal. Please be a good steward of your resources by using wisely the Lord's gifts given to you. Make a will or revise the one you have if you haven't done so in the last five years.

## **Planned Giving**

### **Suggested Bulletin Announcements for Stewardship and Income Gifts—Annuities, Insurance, CRT's**

1. By making a planned gift to our endowment, you'll be providing, perpetual financial support. It's a wonderful way to demonstrate your stewardship and pass on your faith and love for (insert parish name). Contact \_\_\_\_\_ to learn more. Your faith is worth passing on.

2. Planning for death is as natural for the Christian as planning for life. As stated in 1 Timothy 5:8, if *anyone does not take care of his own, and especially of his household; he has denied the faith and is worse than an unbeliever*. Having a will IS good stewardship. Take care of your family.
3. Just as we plan to ensure financial health for our families, we must plan for the health of our faith families. Your planned gift to our endowment will provide financial support forever. You have a wonderful Catholic heritage. Pass it on!
4. Where there is a will there is a way to be an angel for our parish. Please remember our endowment in your will. Your lawyer can add a simple inexpensive amendment (codicil) to your existing will or trust.
5. Don't cancel life insurance you no longer need! By naming our parish as beneficiary, you'll provide lasting financial support and possibly qualify for tax benefits as well. Be an angel and pass on your Catholic Heritage. It costs nothing to change the beneficiary on your policy and it can be done in less than five minutes.
6. What do bequests, life insurance gifts, charitable gift annuities, charitable remainder trusts, and life-time giving have in common? They're ways you can pass on your Catholic Heritage, Faith, and Love for (insert parish name).