

Ways to Give Summary

The following marketing piece provides a simple explanation of the ways in which donors can contribute to your fund. Use this document on visits and/or enclose in mailings.

To access a printable version of this document, [please click here](#).

WAYS TO GIVE

Sustain the mission of your favorite Catholic organization for generations

Give Now

Make an immediate, outright gift to the endowment fund benefiting your favorite parish, school or ministry.

HOW TO GIVE NOW

- Cash
- Marketable Securities
- Real Estate
- Qualified Charitable Distributions (from IRA)

FOR THOSE WHO...

- Want to provide immediate support
- Have assets available to give
- Want to reduce capital gains tax
- May want to give anonymously
- Seek an immediate charitable deduction

Give Later

Retain control of assets during your lifetime and leave a sustaining gift to the endowment fund that benefits your favorite Catholic organization.

HOW TO GIVE LATER

- Will
- Living Trust
- Beneficiary Designations of retirement assets or life insurance policies

FOR THOSE WHO...

- Want to leave a legacy by giving
- Wish to retain control of assets while living
- Wish to make a substantial gift after your lifetime
- Want to help heirs avoid estate tax on retirement accounts and other assets

Give & Receive

Make a gift and receive income for life or a term of years. The remainder at maturity supports the endowment fund of your choice.

HOW TO GIVE & RECEIVE

- Charitable Gift Annuities
- Charitable Remainder Unitrusts

FOR THOSE WHO...

- Want to leave a legacy by giving
- Own appreciated assets
- Seek an additional source of income
- Wish to avoid market volatility
- Seek a partial charitable deduction

Plan with heart. Invest for good.



Roman Catholic Foundation

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