



Legacy SUNDAY

Bequest

A bequest is a gift made through your will or trust. A bequest is the simplest type of planned gift for you to make and easiest to implement.

Donor-Advised Fund (DAF)

You fund a DAF with tax free and/or tax deductible gifts and make charitable gift recommendations during your lifetime. When you pass away, your children can carry on your legacy of giving.

IRA Rollover

An IRA rollover allows people age 70½ and older to reduce their taxable income by making a charitable gift directly from their IRA.

Charitable Gift Annuity (CGA)

A charitable gift annuity is a great way to receive an income for life then make a gift to your favorite organization. You make a gift to the Foundation, receive a charitable deduction and then receive an income stream for your lifetime. After your passing, the endowment you name in the CGA will support your favorite charities.

Life Estate Reserved

You can transfer the ownership of your personal residence to the Foundation, continue to reside there and when you leave, the property is sold to fund an endowment to support your favorite charities.

Gift of Life Insurance

You can transfer an existing policy or create a new policy with the Foundation as the owner and beneficiary. After your lifetime, the proceeds support your favorite charities.

Charitable Remainder Trust

For larger donors, the CRT provides you with the ability to structure your income stream for life. After your lifetime, the trust will distribute to an endowment to support your favorite charities.



Roman Catholic Foundation
of
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