

Roman Catholic Foundation  
*of*  
EASTERN MISSOURI

PLANNED GIVING  
PARTNER TOOLKIT

*Plan with heart.  
Invest for good.*



## Roman Catholic Foundation

of  
EASTERN MISSOURI

*Plan with heart. Invest for good.*

Dear Partner,

Welcome to the Planned Giving Partner Toolkit, a resource to help you establish a successful Planned Giving and Endowment Building Program within your ministry.

As you know, ensuring long-term sustainability for your mission is of the utmost importance for the people you serve and for the local Church. The Roman Catholic Foundation, your planned giving partner, is here to help you secure this sustainability through donor education and endowment fund marketing.

In the pages to come, you will find the following:

- Sound techniques to start or strengthen your Planned Giving and Endowment Building Program
- Step-by-step, easy to follow processes
- Simple presentation of information to educate you and your team
- Templates and sample documents for your use with potential donors

I am confident that by using this toolkit with dedication and enthusiasm to develop and implement your program, you will see very positive results, both in engagement and in dollars raised in support of your organization's endowment fund(s). With that, God's kingdom will grow and flourish for generations.

May God continue to bless you and your organization.

Best regards,

Joe Bestgen

President & CEO

Roman Catholic Foundation

PLEASE NOTE: While the Planned Giving Partner Toolkit is for all partnering parishes, schools and ministries within the Archdiocese of St. Louis, for simplicity in the pages to come, we frequently use the term "organization" to refer collectively to each of these types of institutions.



## Roman Catholic Foundation of EASTERN MISSOURI

### Roman Catholic Foundation: An Overview

#### WHO WE ARE

The Roman Catholic Foundation of Eastern Missouri is a 501(c)(3) public charity, independent from the Archdiocese of St. Louis, governed by a board of trustees.

#### WHAT WE DO

Our mission is to inspire giving and connect donors to Catholic ministries, sustaining the local Church for future generations.

#### WHO WE SERVE

In seeking to build endowment funds to sustain the local Church, we support the parishes, schools and ministries of the Archdiocese of St. Louis with planned giving expertise, education and marketing. We also work with donors to maximize the impact of their gifts on the Catholic ministries they love.

#### BENEFITS OF PARTNERING WITH US

- **Asset Protection**
  - o The Roman Catholic Foundation is legally separate from the Archdiocese of St. Louis; funds invested with the Foundation are therefore protected.
- **Good Stewardship with Sound, Moral Investments**
  - o All funds are invested for long-term sustainability according to the Socially Responsible Investment Guidelines established by the US Conference of Catholic Bishops.
  - o Our investment policies include stringent evaluation criteria in the areas of protecting human life, promoting human dignity and reducing arms production.
- **Education and Marketing**
  - o The Foundation helps parish, school or ministry leaders, staff and volunteers effectively promote planned giving in order to reap for the Church the vast potential benefits of such gifts.
- **Planned Giving Expertise**
  - o We can help secure complex gifts including donations of real estate, private businesses, life insurance policies and retirement accounts.
  - o We provide confidential, individualized assistance to donors of all walks of life who wish to leave a legacy to the Catholic organizations they love.

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## Roman Catholic Foundation

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### What is Planned Giving?

#### Planned gifts are:

- Significant charitable contributions
- Made during or after a donor's lifetime
- Part of a financial or estate plan
- Typically funded with assets rather than income

#### The Case for Planned Giving

Planned giving can be a tremendous source of income for parishes, schools and ministries. A typical planned gift is **200-300 times** the size of a donor's largest annual gift.<sup>1</sup> Planned gifts also solidify a donor's relationship with the organization to which they give, which often leads to increased annual giving.<sup>2</sup>

#### A Significant Opportunity

Between 2022 & 2046, US households will transfer approximately **\$59.8 trillion** in assets, with as much as **\$12 trillion** being transferred to charities.<sup>3</sup> In the St. Louis region households will transfer approximately **\$532 billion** in assets, with as much as **\$93 billion** being transferred to charities. The St. Louis region is 22% Catholic!

#### Seize the Opportunity!

Why haven't more Catholic donors made planned gifts?

***They don't know how*** and ***they haven't been asked***.

The Roman Catholic Foundation is here to partner with you to educate your donors and market planned giving opportunities.

<sup>1</sup> plannedgiving.com

<sup>2</sup> Planned Gifts Increase Annual Gifts, Study Finds. (December, 2014). PGBuzz

<sup>3</sup> Cerulli Associates (2021)

# 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

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## Roman Catholic Foundation

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### Types of Planned Gifts

#### GIVE NOW

##### DONOR-ADVISED FUNDS

Simplify your charitable giving and become eligible for a tax deduction when you make a contribution to establish or add to your fund

*To view the full Donor-Advised Funds brochure, [please click here](#).*

##### DONOR-DESIGNATED ENDOWMENT FUNDS

Create a fund and provide a permanent source of income for your favorite Catholic organizations. You may qualify for a tax deduction with the establishment of your fund.

*To view the full Donor-Designated Endowment Funds brochure, [please click here](#).*

#### GIVE LATER

##### BEQUESTS

Create or add to an endowment fund at the Foundation, without affecting your assets during your lifetime, with a bequest of a specific amount or percentage of your estate, the residual value of your estate or a specific piece of property.

*To view the full Bequests brochure, [please click here](#).*

##### BENEFICIARY DESIGNATIONS

Create or add to a Foundation endowment fund that benefits your favorite parish, school or ministry by simply naming the fund as the beneficiary of your life insurance policy or Retirement account.

*To view the full Beneficiary Designations brochure, [please click here](#).*

#### GIVE AND RECEIVE

##### CHARITABLE GIFT ANNUITIES

Establish your annuity and receive a fixed income stream for life. You may qualify for a partial tax deduction, and the remainder of the annuity at Maturity will be added to a Foundation fund to sustain your favorite parish, school or ministry.

*To view the full Charitable Gift Annuities brochure, [please click here](#).*

##### CHARITABLE REMAINDER UNITRUSTS

Gift your highly appreciated assets, such as stock or real estate, and receive payments for life or a term of years. With your gift, you may become eligible for a partial tax deduction. At maturity, the trust's remainder will be added to a Foundation fund to support your favorite Catholic organization.

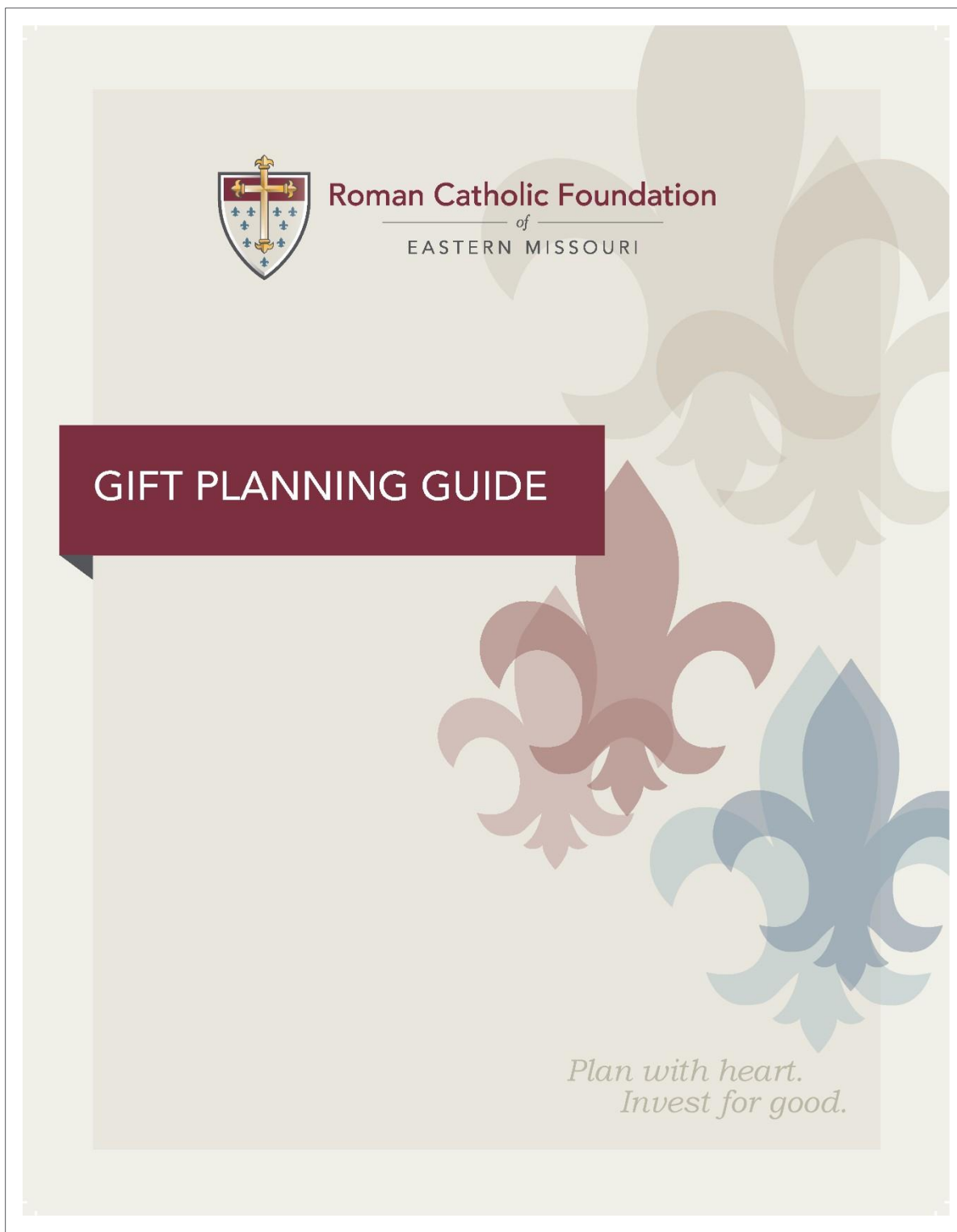
*To view the full Charitable Remainder Unitrusts brochure, [please click here](#).*

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## Gift Planning Guide

*The following eight-page Gift Planning Guide provides an overview of how the Roman Catholic Foundation partners with parishes, schools, ministries and individual donors to sustain the local Church for future generations. The guide also details specific planned giving opportunities.*

*To view the full Gift Planning Guide, [please click here](#).*



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## Roman Catholic Foundation of EASTERN MISSOURI

### Benefits of an Endowment Fund

#### *For Organizations*

##### **Provides a “target” for planned gifts**

An organizational endowment fund assures donors that their planned gift will make a lasting impact. Donors are more likely to create planned gifts when they can direct them to a permanent fund.

##### **Creates an ongoing source of income**

Growing over time with market value appreciation and additional gifts, an endowed fund that provides for programs or operating support can continue to provide the income to meet those needs for generations.

##### **Enhances stability and prestige**

A well-managed endowment fund enhances an organization’s credibility with donors by sending a message of long-term stability, fiscal responsibility and financial viability.

##### **Solidifies annual giving**

Donors who have made a planned gift to an organization’s endowment fund have made a commitment to that organization’s future and are therefore likely to sustain or increase their annual support.

#### *For Donors*

##### **Offers ability to perpetuate values and priorities**

Gifts to an organizational endowment fund can perpetuate donors’ values, providing assurance that the mission of the organization they so strongly believe in will endure, even beyond their lifetimes.

##### **Provides opportunity to make significant investment in the future**

Through planned giving, donors can receive great satisfaction in making a significant, lasting endowment fund contribution from assets accumulated over a lifetime.

##### **Provides a meaningful gifting opportunity**

Contributions to an endowment fund can be made in any amount at any time by any one; family and friends can make enduring gifts in honor of those who are truly dedicated to the organization.

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“TELL THEM TO  
DO *good*, TO  
BE RICH IN *good*  
*works*, TO *be*  
*generous*,  
READY TO  
*share*, THUS  
ACCUMULATING  
AS TREASURE  
A *good*  
*foundation*  
FOR THE FUTURE,  
SO AS TO WIN  
THE LIFE THAT IS  
*true life*.”  
(1 Timothy 6:18-19)

## ORGANIZATIONAL ENDOWMENT FUNDS

HERE'S HOW THEY WORK:



AN ORGANIZATIONAL ENDOWMENT FUND CAN HELP ENSURE FINANCIAL STABILITY  
FOR PARISHES, SCHOOLS AND OTHER CATHOLIC MINISTRIES LONG INTO THE FUTURE.

# Your Planned Giving and Endowment Building Program: *Three Steps to Success*

## **1. Build Your Team**

### Recruit

- [Identify and Recruit a Planned Giving and Endowment Building Team](#)
- [Planned Giving and Endowment Building Team Member Recruitment Letter](#)
- [Planned Giving and Endowment Building Team Member Job Description](#)

### Educate

#### Planned Giving

- [Planned Giving: Explained](#)
- [Types of Planned Gifts](#)
- [Gift Planning Guide](#)

#### Endowments & the Roman Catholic Foundation

- [Roman Catholic Foundation: An Overview](#)
- [Endowment Funds: How They Work](#)
- [Benefits of an Endowment Fund](#)

#### Making the Ask

- [How to Ask for Planned Gifts to Support the Endowment Fund](#)
- [Frequently Asked Questions](#)

## **2. Develop Your Plan**

### Set Goals

- [Setting Goals for your Planned Giving and Endowment Building Program](#)

### Prepare Your Strategy

- [Your Planned Giving and Endowment Building Program: Step-by-Step](#)
- [Annual Communications Calendars](#)

### Identify Prospects

- [Assessing Your Planned Giving Prospects](#)
- [Extracting and Assessing Planned Giving Prospects \(for parishes\)](#)

## **3. Execute Your Plan**

### Implement with Resource Materials

#### Media and Marketing

- [Planned Giving/Endowment Content and Links for Website](#)
- [Bulletin/Newsletter/Social Media Announcements](#)
- [Pulpit Announcements \(for parishes\)](#)
- [Customizable Endowment Fund Brochure](#)
- [Ways to Support Our Fund Poster](#)
- [Planned Giving Content for Annual Appeal Response Devices](#)
- [Planned Gift Language](#)

#### Direct Mail Letter Templates

- [General Appeal Letter \(Response Device provided by Roman Catholic Foundation\)](#)
- [Personal Visit Letter for Top Donors](#)
- [Appeal Letter for Top Donors](#)

#### Forms & Flyers

- [Ways to Give Summary](#)
- [Planned Gift Intention Form](#)

# Your Planned Giving and Endowment Building Program: Step-by-Step

*The following is a sample marketing plan for the first year of your Planned Giving and Endowment Building Program.*

## **Prayer** – Ongoing

- ☐ Pray for the success of your Planned Giving and Endowment Building Program

## **Build Your Team** – Months 1-3

### Recruit

- ☐ Recruit a chairperson who will lead the team and coordinate with the Roman Catholic Foundation
- ☐ Recruit 4-8 additional team members, depending on your organization's size

### Educate

- ☐ Schedule an on-site orientation for the team with a Foundation representative
- ☐ Ensure that all team members have knowledge of the Roman Catholic Foundation, the endowment fund and various planned giving opportunities
- ☐ Invite all team members to establish their own planned gifts to the endowment fund

## **Develop Your Plan** – Months 3-6

### Set Goals

- ☐ Set goals for your Planned Giving and Endowment Building Program

### Prepare Your Strategy

- ☐ Establish a marketing plan & communications calendar to educate and engage your donors
- ☐ Order customized endowment fund brochures
- ☐ Schedule a date for a Planned Giving and Endowment Building Program kick-off weekend(s), which should include:
  - ☐ Announcements at all Masses and/or major events
  - ☐ Planned giving team members available to answer questions afterward
  - ☐ Posters displayed and informational materials available
- ☐ Update your organization's website with planned giving messaging and a link to [rcfstl.org](http://rcfstl.org)
- ☐ Print and display planned giving posters for the parish/organization in the lobby
- ☐ Begin following your marketing plan and communications calendar to include planned giving content in newsletters, social media, e-blasts, pulpit announcements, bulletin articles and annual appeal mailings

### Identify Prospects

- ☐ Use point system to determine best prospective planned giving donors
- ☐ Develop master tracking spreadsheet to monitor team's activity

### ***Execute Your Plan – Months 7-10***

- ☐ Implement direct mail campaign to top donors
  - ☐ Personal Visit Letter
  - ☐ Customizable Brochure
- ☐ Conduct personal visits with those who received mailing
  - ☐ Appeal Letter for Top Donors
  - ☐ Customizable Brochure
  - ☐ Ways to Give Summary
  - ☐ Planned Gift Intention Form
- ☐ Execute general direct mail campaign
  - ☐ General Appeal Letter
  - ☐ Response Device (provided by Roman Catholic Foundation)
  - ☐ Customizable Brochure
- ☐ Host kickoff weekend
  - ☐ Announcements at all Masses and/or major events
  - ☐ Planned giving team members available to answer questions
  - ☐ Posters displayed and informational materials available
- ☐ Continue following your marketing plan and communications calendar to include planned giving messages in newsletters, social media, e-blasts, pulpit announcements, bulletin articles and annual appeal mailings

### ***Follow-Up – Months 11-12***

- ☐ Invite parishioners/donors, especially your best prospective planned giving donors, to attend a Legacy Planning Seminar or your parish's presentation of The Conversation: A Catholic Perspective on Cycle-of-Life Issues, where Charitable Gift Planning will be a primary topic
- ☐ Continue engagement with the Foundation through regularly scheduled Planned Giving Symposiums and resources and communications such as the monthly Legacy Link (newsletter)
- ☐ Continue following your marketing plan and communications calendar to include planned giving messages in newsletters, social media, e-blasts, pulpit announcements, bulletin articles and annual appeal mailings
- ☐ Conduct an annual review of your planned giving marketing plan and communications calendar
- ☐ Report annual progress to the parish/donors in bulletin/newsletter or personal letter

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# Identify and Recruit a Planned Giving and Endowment Building Team

Leadership is important with any Planned Giving and Endowment Building Program. Beyond the pastor/organization leader, the Planned Giving and Endowment Building Program needs a chairperson and 4-8 additional team members. The team should be diverse and include some of the most respected, spiritually motivated friends of the organization.

Team members should:

- Be well known and respected in the organization and grasp the necessity of a planned giving and endowment building program
- Have been involved with the organization for a significant length of time and know many individuals and families who have also been involved for many years
- Attend Mass and/or events regularly and have demonstrated dedication to the organization's mission by actively participating in one or more ministries over the years
- Have donated financial gifts on a regular basis in support of the organization, ideally having established, or being willing to establish, a planned gift in support of the endowment fund(s)
- Have time to devote to the effort
- Have background or interest in stewardship, fundraising/development, sales, marketing, financial planning or estate law
- Be able to maintain confidentiality
- Be patient and passionate about the endowment fund
  - o Planned Giving and Endowment Building Programs do not reap immediate financial rewards; the team's task is to teach, plant seeds and convey the positive impact of planned giving on the ministry.

In addition to the above criteria, consider engaging professional advisors within the organization who can contribute to your Planned Giving and Endowment Building Program by virtue of their professional expertise. Consider individuals involved with the organization who are:

- Attorneys familiar with tax matters and estate planning
- Certified Public Accountants
- Involved with life insurance sales
- Certified Financial Planners
- Bank and Trust Officers
- Planned Giving Professionals in other organizations

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# Planned Giving and Endowment Building Team Member Role Description

*The following is a SAMPLE Planned Giving and Endowment Building Team Member job description, which you can customize to fit the needs of your program. Enclose this job description with the team member recruitment letter.*

*To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

Our Planned Giving and Endowment Building Program is vitally important to the long-term sustainability of our ministry. As a member of the Planned Giving and Endowment Building Team, you will be instrumental in educating fellow parishioners/donors about our endowment fund (when applicable) and the importance of planned giving in growing our fund and sustaining our organization for future generations.

## Qualifications:

- Spiritual commitment to the stewardship mission of our organization, as evidenced by faithful donations of time, talent and treasure to our various activities
- Strong interpersonal and organizational skills; ability to work productively with our staff and volunteers
- Demonstrated leadership skills
- Skills or interest in the areas of stewardship, fundraising/development, sales, marketing, financial planning or estate law

## Expectations:

- Commit to making a planned gift to our organization and consider sharing your personal testimonial about your contribution with fellow parishioners/donors
- Attend and participate in all Planned Giving and Endowment Building Team meetings (usually held quarterly)
- Participate in the development and execution of a marketing plan in support of our organization
- Attend and participate in events educating and/or honoring planned giving donors and potential donors
- Assist in the identification, cultivation and solicitation of prospective planned giving donors
- Assist in the identification and recruitment of individuals and/or couples who are willing to share personal testimonials with others about their contributions to —or engagement with— our Planned Giving efforts
- Assist in identifying, recruiting and orienting new Planned Giving and Endowment Building Team members

# Planned Giving and Endowment Building Team Member Recruitment Letter- Organizations without an Endowment with the Roman Catholic Foundation

*The following letter can be used to recruit volunteers for your Planned Giving and Endowment Building Team.*

*To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

Dear <<Salutation>>,

Your leadership within our organization is indispensable. It is apparent that you have a deep commitment to our mission and to God's call to serve others. Thank you for the support you have shown over the years.

<<Organization>> has partnered with the Roman Catholic Foundation of Eastern Missouri to build a Planned Giving and Endowment Committee to assist with the development and execution of an organization-wide outreach to our (parishioners/donors). The purpose of this partnership is to encourage our (parishioners/donors) to consider the creation of a Planned Gift which will provide for our needs now and long into the future.

The Roman Catholic Foundation, our planned giving partner, provides assistance in the areas of education and marketing, and with their guidance, we can make a significant impact. To begin, we need volunteers who are dedicated to our mission and willing to educate their fellow <<parishioners/donors>> about the value of planned giving as a way to secure our financial future.

Because you are such a valued member of our faith community, your name immediately came to mind when I began considering who could best serve in this capacity.

I invite you to consider serving as a member of our Planned Giving and Endowment Building Team. The enclosed job description will provide additional details, and I am happy to schedule a time to discuss, by phone or in person, this important endeavor with you.

Thank you, once again, for your dedication to our organization. May God continue to bless you and your family.

Blessings,

<<Signature>>

<<Name>>

<<Title>>

<<Organization>>

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# Setting Goals for your Planned Giving and Endowment Building Program

Goals are important in any fundraising initiative but are especially important in building a Planned Giving Campaign. Where an annual appeal is measured by dollars raised, a Planned Giving effort must be measured in large part by non-financial goals. Setting clear goals allows your organization to make an effective annual evaluation of progress.

Most Planned Giving and Endowment Building Programs have short-term and long-term goals. Goals will vary depending upon the organization, but below are some common financial and non-financial goals for an endowment building effort.

## Short-term goals may include:

- Identifying and training your planned giving team and organization staff on planned giving
- Identifying your top prospects by segmenting your donor base into categories, for example:
  - o Those who contribute small to moderate amounts (\$200-\$1,000 annually) consistently over many years
  - o Those who contribute significant amounts (\$1,000+ annually) consistently over many years
  - o Those who give significant gifts to special projects
  - o Active volunteers, who have committed 25+ hours/year
- Conducting an initial campaign among the organization's leadership (e.g., Parish Council members, Committee Chairs, etc.)

## Long-term goals may include:

- Making a specific number of personal visits to solicit support for the campaign
- Securing a specific number of Planned Gift Intention Forms
- Raising a specific dollar amount in current and/or future planned gifts

Remember, unlike most other types of fundraising, planned giving efforts do not have an end point. While donors might not commit to a planned gift after one or even several discussions, it is vital to keep informational opportunities about planned gifts in their minds so that when life circumstances favor a planned gift, they are knowledgeable and prepared.

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# Annual Communications Calendar

The following communications calendar can help you stay on track with the marketing plan you develop for your Planned Giving and Endowment Building Program. Review the suggested use for Bulletin/Newsletter/Social Media and Pulpit Announcements, select your announcements and dates and plug the announcement numbers into the calendar. You may also use the calendar to indicate the dates of mailings to potential donors.

For a Microsoft Excel version of this document that you can customize for your use, [please click here](#).

Planned Giving and Endowment Building Program

Annual Communications Calendar

<<Date>>

| Month 1               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 2               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 3               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 4               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 5               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 6               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 7               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 8               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 9               |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 10              |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 11              |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

| Month 12              |   |   |   |   |
|-----------------------|---|---|---|---|
| Week                  | 1 | 2 | 3 | 4 |
| Bulletin Announcement |   |   |   |   |
| Social Media          |   |   |   |   |
| Pulpit Announcement   |   |   |   |   |
| Mailing               |   |   |   |   |
| Newsletter            |   |   |   |   |
| E-blast               |   |   |   |   |

## Frequently Asked Questions – RCF and Endowments

*The following questions are common among donors who are asked to support an organizational endowment fund at the Roman Catholic Foundation. Organization leaders and volunteers new to endowments and planned giving concepts will likely also have many of these questions.*

### **What is the Roman Catholic Foundation?**

The Roman Catholic Foundation is a 501(c)(3) public charity, independent from the Archdiocese of St. Louis. The Foundation was established in 2013 with the goal of building endowed funds that will support Catholic parishes, schools and ministries throughout the Archdiocese of St. Louis for generations to come.

### **How was I chosen to be approached by a planned giving and endowment building team member?**

In working to increase endowment funds for our ministry, a number of factors including engagement and giving history were considered. Your past dedication and generosity to our ministry demonstrates that you might be interested in leaving a legacy to support the mission of our organization after your lifetime.

### **What is a planned gift?**

A planned gift is a significant charitable gift, made either during a donor's lifetime or at death as a part of his/her financial or estate plan, which is typically funded with assets (not income). In contrast, gifts made to the parish offertory or to annual appeals are usually funded with income and are generally not part of a larger financial or estate plan.

### **Will I receive tax benefits from a planned gift?**

While there is no guarantee of any particular tax advantage, planned gifts are often offset by attractive tax benefits. The experts at the Roman Catholic Foundation can help you understand the potential tax implications of your gift. You should also consider discussing your plans with a financial advisor and/or legal professional.

### **How do I make a planned gift?**

There are a number of ways to leave a legacy to benefit our ministry. The Roman Catholic Foundation exists to serve donors and the parishes, schools and ministries of the Archdiocese of St. Louis. Their experts can provide confidential guidance to help you develop your planned giving goals and maximize the impact of your gifts on your favorite Catholic ministries.

### **How should my planned gift compare to my annual/offertory giving?**

Planned gifts are typically funded with assets and often cost donors nothing during their lifetimes, where annual gifts are typically funded with income. Accordingly, planned gifts are often up to 300 times greater than a donor's largest annual gift!

### **Am I being asked to leave a planned gift in addition to my annual contributions?**

Yes. Because planned gifts are funded with assets rather than income and often cost donors nothing during their lifetimes, we ask you to consider a planned gift in addition to your generous annual contributions.

### **How do I know the endowment fund will exist in perpetuity?**

Funds at the Roman Catholic Foundation are permanent funds, invested for the long term, with the goal of making annual distributions according to the endowment document and the board-approved distribution rate.

## **How are the funds managed?**

Funds held at the Roman Catholic Foundation are managed by Graystone Consulting, an independent business unit of Morgan Stanley. All funds are invested according to the Socially Responsible Investment Guidelines established by the US Conference of Catholic Bishops (USCCB). The Foundation's investment policy mandates responsible stewardship by both seeking a reasonable (or competitive) financial return on its investments and doing so in a manner consistent with the social teachings of the Catholic Church. Investment policies include stringent evaluation criteria in the areas of protecting human life, promoting human dignity and reducing arms production. The Foundation's board of trustees oversees investment policies, and an investment sub-committee, made up of board members and other Catholic professionals meets quarterly to review the investment portfolio and its performance.

## **What happens if the recipient of the endowment fund's distributions ceases to exist?**

Most often, endowment funds are created by the benefitting organization which falls under theegis of the Archdiocese of St. Louis. Typically, the organization is subject to Canon Law, so in the event that our organization ceases to exist, it has probably been merged or subsumed to another Archdiocesan organization, so the endowment will follow to the new organization with the same provisions for distribution.

## **Who determines how our endowment fund distributions are spent?**

Upon establishing an endowment fund with the Roman Catholic Foundation, the establishing party names the benefitting organization and purpose of the fund. If a fund is established for the general support of an organization, the leaders within that organization determine specific use of the funds.

## **How are Foundation funds protected?**

Assets at the Roman Catholic Foundation of Eastern Missouri are carefully managed to ensure donor intentions are fulfilled. As an independent non-profit organization, we have an independent board and investment committee that ensures that assets are invested according to our investment policy. Our investment committee includes a number of members who are financial advisors and asset managers and we employ the services of an investment consultant to provide additional investment advice. Our endowment assets are managed according to the Uniform Prudent Management of Institutional Funds Act (UPMIFA). Further, our financial statements are audited each year by an independent outside auditor and our audited financial statements are posted on our website. We also post our quarterly investment performance on our website.

## **Are distributions from our endowment fund subject to Archdiocesan cathedraticum?**

No. Endowment fund distributions to parishes, schools and ministries are not subject to the Archdiocesan cathedraticum or assessments.

## **If I want to contribute to our endowment fund now, how should I make the check payable?**

Checks should be made payable to Roman Catholic Foundation/<<Fund>>.

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# Planned Giving/Endowment Content and Links for Website

*The following sample introductions to planned giving/endowments and links to the Roman Catholic Foundation's website can be used on your organization's website. Choose one of the four options or mix and match to develop your own. For a direct link to your endowment fund listing on [rcfstl.org](http://rcfstl.org), please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

1. <<Organization>> is pleased to partner with the Roman Catholic Foundation of Eastern Missouri in building our endowment fund to sustain <<Organization's>> mission for future generations.

Please consider helping us build our fund by using one of the options below.

## Give Now:

- o Online at [rcfstl.org/fund/](http://rcfstl.org/fund/)
- o By check to: Roman Catholic Foundation/  
<<Fund>>  
c/o Roman Catholic Foundation  
425 N. New Ballas Road, Suite 200  
St. Louis, Missouri 63141
- o By transferring marketable securities. For instructions, please contact John Modder at 314.918.2894 or [john.modder@rcfstl.org](mailto:john.modder@rcfstl.org).

## Give Later:

- o Give to our fund through your will or trust, or name the fund as beneficiary of your life insurance policy or retirement account by using the following: Roman Catholic Foundation of Eastern Missouri (EIN 46-3309222), for the benefit of <<Fund>>.

## Give and Receive:

- o Establish a Charitable Gift Annuity, receive a fixed income stream for life, and the remainder will be added to the <<Fund>> at maturity.
- o Gift your highly appreciated assets to a Charitable Remainder Unitrust, receive payments for life or a term of years, and the remainder will be added to our fund at maturity.

For confidential assistance, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org) | [www.rcfstl.org](http://www.rcfstl.org).

The Roman Catholic Foundation is a 501(c)(3) public charity, independent from the Archdiocese of St. Louis, that partners with Catholic parishes, schools, and ministries to sustain the local Church for future generations.

2. After years of faithful support to <<Organization>>, you may wish to leave a planned gift to benefit <<Fund>> to sustain our mission long into the future. Such a gift will allow you to extend your devotion to the Church beyond your lifetime.

A planned gift is one that comes from assets and therefore allows you to make a larger contribution than you could from income. While some planned gifts can provide you with a lifetime income, others use estate and tax planning techniques to maximize your gift and/or minimize the impact on your estate.

We are pleased that the Roman Catholic Foundation of Eastern Missouri is our planned giving partner. The Foundation's mission is to inspire giving and connect donors to Catholic ministries, like <<Organization>>, sustaining the local Church for future generations. The Foundation assists

donors with planned gifts in any form, including those from a will, trust or retirement plan, helping them sustain the Catholic parishes, schools and ministries of their choice.

Learn more about ways to create your planned gift to provide lasting support for <<Organization>> at [www.rcfstl.org](http://www.rcfstl.org).

3. Planned giving allows you to make a significant impact on <<Organization>>, likely at no cost to you during your lifetime. Planned gifts typically also provide you or your heirs with tax advantages. Anyone, even those with a modest estate, can help secure <<Organization>>'s future by establishing a planned gift to support <<Fund>>.

We are pleased to have the Roman Catholic Foundation of Eastern Missouri as our planned giving partner. The Foundation's mission is to inspire giving and connect donors to Catholic ministries, sustaining the local Church for future generations. The Foundation helps donors identify their giving goals and maximize the impact of their gifts on the ministries they love.

To learn about the many ways you can create establish your Catholic legacy and sustain <<Organization>>, please visit [www.rcfstl.org](http://www.rcfstl.org).

4. Planned giving, often called "legacy planning," enables you to make larger gifts in support of <<Organization>> than you likely ever thought possible. While some planned gifts can provide you with a lifetime income, others use estate and tax planning techniques to maximize your gift and/or minimize the impact on your estate.

We are pleased to have the Roman Catholic Foundation of Eastern Missouri as our planned giving partner.

The Foundation's mission is to inspire giving and connect donors to Catholic ministries, sustaining the local Church for future generations. The Foundation assists donors in making planned gifts from their assets to the Catholic parishes, schools and ministries of their choice.

To learn more about how you can create a planned gift to provide lasting support for <<Organization>> through the <<Fund>>, please visit [www.rcfstl.org](http://www.rcfstl.org).

5. Planned gifts can make a substantial impact on <<Organization>>, creating a legacy for our ministry that lasts for generations.

Planned gifts can offer you significant benefits. For example, planned gifts allow you to maintain control of your assets during your lifetime, take advantage of a number of tax benefits, or perhaps even secure a lifetime income stream for yourself or others.

Planned gifts typically come from your assets rather than income. They are perfect for individuals and families of all ages and levels of income who wish to leave a sustaining gift to the Catholic organizations they hold dear. Strategic planned giving can allow anyone to create a lasting legacy for <<Organization>>.

Learn more about how you can sustain <<Organization>> for generations with a planned gift to <<Fund>> at [www.rcfstl.org](http://www.rcfstl.org).

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# Bulletin/Newsletter/Social Media Announcements

*The following announcements are intended for use in bulletins, social media and newsletters. They are arranged from long announcements (numbers 1-29) to short announcements (numbers 30-75). As you develop your marketing plan, please select the announcements you think best suited to your purposes. Insert the names of your organization and fund where indicated. The photos can be customized by The Roman Catholic Foundation with the logo and information of each individual parish.*

*Suggested use:*

- One long announcements (numbers 1-29) per month.
- Three short announcements (numbers 30-75) per month.

1.




## WHAT IS <<FUND>>


<<Fund>> serves to fortify the financial future of <<Organization>> now and for generations. <<Organization>> established <<Fund>> with the help of our planned giving partner, the Roman Catholic Foundation of Eastern Missouri, in effort to sustain our mission long beyond our lifetimes. By contributing to <<Fund>> with a planned gift, you can help to ensure that <<Organization>> is able to carry out its mission for generations. To learn how you can sustain <<Organization>> with a planned gift to << Fund>>, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2890 | [giftplanning@rcfstlorg](mailto:giftplanning@rcfstlorg)



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2.





## <<Organization>> Partners with the Roman Catholic Foundation

The Roman Catholic Foundation of Eastern Missouri is a 501(c)(3) public charity, independent from the Archdiocese of St. Louis, that works with you to plan your giving strategy and fulfill your passion for helping others. The Foundation also serves as the gift planning expert for parishes, schools and ministries to sustain the local Church for future generations. By partnering with the Roman Catholic Foundation, <<Organization>> can establish the long-term funds that will fortify our ministry long into the future. To learn how you can support <<Organization>> with a planned gift to <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2890 | [giftplanning@rcfstlorg](mailto:giftplanning@rcfstlorg)

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3.

## THE BENEFITS OF GIFT PLANNING

You can make a bigger difference than you think! Planned giving allows you to convert property you might not consider as potential gifts into contributions to benefit <<Organization>>. You can even make a substantial gift that costs you nothing during your lifetime through your will or trust or with a beneficiary designation of a life insurance policy or retirement account.

To learn more about how you can sustain <<Organization>> with a planned gift to <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org).



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4.



ST. ALBAN ROE  
CATHOLIC PARISH



## THE BENEFITS OF GIFT PLANNING

Creating a will is an important way to define what matters most to you. The Roman Catholic Foundation can help you understand the advantages of establishing a will and assist you in structuring your will to sustain <<Organization>> for future generations. What better way to leave your legacy than in the love of Jesus Christ?

For more information on planning with heart to support <<Organization>> well beyond your lifetime, please contact the planned giving experts at the Roman Catholic Foundation at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org).



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5.



## THE JOY OF GIVING


The joy of giving is itself a gift. Planned giving allows individuals and families to offer significant support to the ministries they hold dear, improving the lives of those in need and growing the Kingdom of God in the process. Consider making a planned gift to benefit <<Organization>>, and experience the joy of passing forward your blessings to others!

To learn more about how the Roman Catholic Foundation can assist you in sustaining <<Organization>> with a gift to benefit <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org).





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6.




**HOLY TRINITY**  
CATHOLIC CHURCH  
Believe • Belong • Become  
San Antonio, Texas



## SEASON OF THANKSGIVING

As we reflect on the year's blessings, we are grateful for your faithful support. Through your generosity, <<Organization>> is able to carry out the important work of our mission. Please consider continuing your support of our mission beyond your lifetime by making a planned gift to benefit <<Organization>> through the Roman Catholic Foundation. In doing so, you will help ensure that our Catholic community continues serving the next generation for the Kingdom of God.

To learn how you can make a sustaining gift to benefit <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org).



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7.

## PLANNING IN THE NEW YEAR

As you transition into the new year, have you decided how you will leave a legacy for your family and faith community? In developing your plans, consider supporting <<Organization>> long into the future with a gift through the Roman Catholic Foundation. To learn how you can sustain <<Organization>> with a planned gift to benefit <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org).



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8.



## DONOR-ADVISED FUNDS

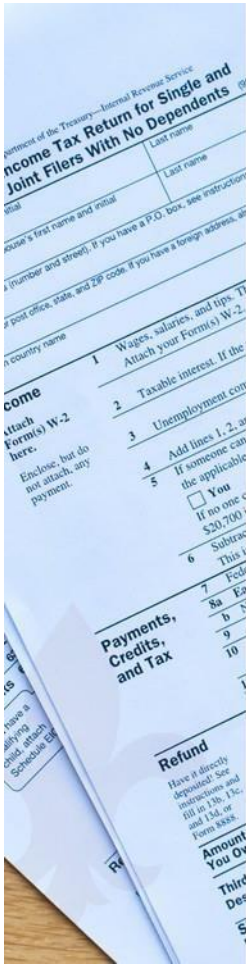
Would you like to streamline your charitable giving? A donor-advised fund is easy to create and can offer immediate tax benefits while simplifying your yearly charitable giving, including your generous gifts to <<Organization>>.

To find out what a donor-advised fund can do for you, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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9.



## TAX BENEFITS OF GIFT PLANNING

Did you know that planned gifts may be offset by savings in federal or state taxes?

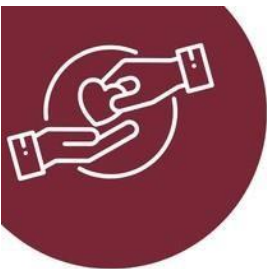
Your planned gift to benefit <<Organization>>, through the Roman Catholic Foundation, can help ensure we are able to carry out our mission for generations while also offering attractive tax benefits to you.

For more information about the tax benefits of planned giving, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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## DOES GIFT PLANNING AFFECT ANNUAL GIVING?

Concerned that a planned gift could negatively affect <<Organization>> in the short-term? Don't worry; planned gifts often cost you nothing during your lifetime or come from your low-yielding assets. With a planned gift, <<org>> can continue receiving your essential support today and receive an extraordinary, sustaining gift tomorrow.

Please contact the planned giving experts at the Roman Catholic Foundation to discuss making your planned gift to <<Fund>>.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)



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11.

## TESTAMENTARY INTENTIONS

To leave a legacy is to reveal our hearts, for our legacy is a final testament of who we are and what we value. Regardless of your age or economic status, we encourage you to begin thinking about the legacy you wish to leave behind and consider remembering <<Organization>> with a planned gift to benefit <<Fund>> through the Roman Catholic Foundation.

To get started planning your Catholic legacy, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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12.



## IT'S VACATION TIME—ARE YOU PREPARED?

Many people spend more time planning their vacations than they do planning their estates. Summer is the perfect time to make sure your will and estate plans are in order. Proper planning can help you protect your family and your estate.

To leave a gift to <<Fund>> in your estate plans, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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13.



## WHAT IS AN ENDOWMENT AND WHY DO WE NEED ONE?

Endowment funds are designed to provide long-term sustainability. At <<Organization>>, we need our endowment fund to ensure we are able to carry out our mission long into the future. Each year, we use just a portion of our fund's earnings, allowing for growth. Through careful investing and consistent growth, our fund provides a buffer against inflation and a permanent source of financial support for our ministry.

To learn how you can support our endowment fund with a planned gift, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



14.



## PLANNED GIVING: WHAT IS IT?

Planned giving is the establishment of a gift as part of an overall financial or estate plan.

Gifts can be distributed immediately or upon the donor's death and are funded with assets rather than current income. Planned giving allows donors to make a significant impact on the Catholic organizations they love, while offering attractive tax benefits to donors or their estates.

To learn how planned giving can benefit you and <<Organization>>, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



15.



## HOW WILL YOU PASS ON YOUR CATHOLIC LEGACY?

Just as we plan to ensure financial health for our families, we must plan for the financial health of our faith community.

Your planned gift to benefit <<Fund>> through the Roman Catholic Foundation will have an impact for years beyond your lifetime, and is a great way to steward your finances and pass along your faith and commitment to <<Organization>>.

Please contact the experts at the Roman Catholic Foundation to begin planning your Catholic legacy. 314.918.2890 [info@rcfstl.org](mailto:info@rcfstl.org)



16.



## HOW WILL YOU BE REMEMBERED?

Creating a will is one of the most important ways to record what matters most to you—personally, financially and spiritually. It is an opportunity to make your most substantial charitable gifts and sustain the future of <<Organization>>, establishing a memorial that will last for generations.

To discuss leaving your legacy with a deferred gift to benefit <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation. 314.918.2893, [info@rcfstl.org](mailto:info@rcfstl.org)





17.



## BLESSINGS OF GENEROSITY

Your generosity is a blessing! Through your faithful support, <<Organization>> can carry out the important work of our mission. Please consider extending your support of our mission beyond your lifetime by making a planned gift to benefit <<Fund>> at the Roman Catholic Foundation. In doing so, you will help to ensure that <<Organization>> continues serving the next generations for the Kingdom of God.

To learn how you can sustain <<Organization>> for generations, please contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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18.



## CONSIDER THE POSSIBILITIES OF YEAR-END GIVING

We often express thanks to God by giving to others. As you consider your charitable contributions, remember that gifts made now may generate income tax deductions that will reduce your tax bill. The Roman Catholic Foundation can assist you with bequests, IRA Charitable Rollovers or gifts of appreciated stocks, real estate and cash to benefit <<Organization>>.

For more information on <<Fund>> and the tax benefits of planned giving, please contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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19.



## PLANNED GIVING IS FOR EVERYONE

Anyone—regardless of income or age—can make a planned gift, and you might be able to contribute more than you think! Through planned giving, you can make a tremendous impact on <<Organization>>, likely at no cost to you during your lifetime.

To learn how you can sustain <<Organization>> well beyond your lifetime with a planned gift to benefit <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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20.



## CONSIDER A SACRIFICIAL GIFT THIS LENT

Lent provides an opportunity to strengthen our devotion to God through prayer, fasting and almsgiving. Please prayerfully consider this time to make a planned gift to benefit <<Fund>>, strengthening <<Organization>> and keeping our Faith alive for generations to come.

To learn about planned giving opportunities, please contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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21.



## YOUR GIFT FROM THE HEART

May God bless your heart for giving! We are grateful for your generous gifts in support of our mission.

Partnering with the Roman Catholic Foundation to make a planned gift for the benefit of <<Organization>> allows you to demonstrate a legacy of love for Christ and His Church. Our faith is a treasure to be passed on.

To support <<Fund>> with a planned gift, please contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2893 | [info@rcfst.org](mailto:info@rcfst.org)



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22.



## HOPE, FAITH AND LOVE

Planned giving is a powerful opportunity to ensure your most sacred values and commitments are part of your legacy.

Your planned gift represents your love of Christ and His Church, your faith in the generations to come and your hope for the future of <<Organization>>.

To leave your legacy with a planned gift to benefit <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation.

314.918.2893 | [info@rcfst.org](mailto:info@rcfst.org)



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23.



## HOW YOUR GIFTS CAN KEEP GIVING

Imagine a gift that gives for generations. Your donations of cash, stock, real estate or life insurance, entrusted to benefit <<Organization>> through the Roman Catholic Foundation can grow to provide sustained, and even increased, support for ministries that change lives, now and for generations.

To learn more about how your gift to benefit <<Fund>> today can strengthen <<Organization>> long into the future, please contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2893 | [info@rcfst.org](mailto:info@rcfst.org)



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24.



## PLANTING SEEDS OF HOPE AND FAITH

Planting seeds for future fruit is an act of hope and an expression of faith. We plant in faith by entrusting those who follow us to nurture the tree that grows and harvest the fruit. By making a planned gift to benefit <<Fund>> at the Roman Catholic Foundation, you plant a seed that will bring forth the promised fruit which will support <<Organization>> well beyond your lifetime. To learn about giving opportunities, please contact the planned giving experts at the Roman Catholic Foundation.

314.918.2893 | [info@rcfst.org](mailto:info@rcfst.org)



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26.



## THE BENEFITS OF GIFT PLANNING – BACK TO BASICS

You may have a "hidden asset" that could make a significant impact on <<Organization>>! If you hold life insurance coverage that you or your family no longer need, consider gifting the paid-up policy to the Roman Catholic Foundation in support of <<Fund>> or designate the fund as beneficiary.

You'll get an immediate charitable deduction and deliver a substantial gift without affecting your investment portfolio or cash flow.

To learn more, please contact the planned giving experts at the Roman Catholic Foundation.

314.918.2893 | [info@rcfstl.org](mailto:info@rcfstl.org)



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27.

## YEAR-END PLANNING



You may soon begin thinking of the charitable gifts you want to make before year's end. Consider these questions as you plan: What assets would you like to dispose of? Can any be used to fund a life-income arrangement, such as a charitable gift annuity or charitable remainder unitrust? What organizations are on your gift-giving list? Did you remember <<Organization>>?

To make the most of your year-end giving and support <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation, at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org)



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28.

## YEAR-END PLANNING



At year's end, we express thanks to God by giving to others. Carefully considering the type and timing of your charitable gifts can increase their impact on the ministries they support. The Roman Catholic Foundation is your planned giving partner, helping you determine the most effective manner of giving to best sustain <<Organization>> for future generations.

To learn how you can make the most of your year-end giving and support <<Fund>>, please contact the planned giving experts at the Roman Catholic Foundation at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org)



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29.



## IRA CHARITABLE ROLLOVERS

Did you know if you are age 70 ½ or older, you can distribute up to \$100,000 tax-free each year from your IRA account to benefit <<Organization>>?

For details on contributing to <<Fund>> with an IRA Charitable Rollover, please contact the planned giving experts at the Roman Catholic Foundation at 314.918.2890 or [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org).



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## Bulletin/Newsletter/Social Media Announcements continued

*Please contact the Roman Catholic Foundation at 314.918.2890 or [info@rcfstl.org](mailto:info@rcfstl.org) for customizable photo images of the following "short announcements" for use in bulletins/newsletters/social media announcements.*

### 30. Have you revised your estate documents lately? Should you?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

### 31. Give a gift that lasts beyond your lifetime.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

### 32. Over 73? Use your IRA Required Minimum Distribution for good, benefiting your favorite Catholic organization.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

### 33. Want to save on taxes? Your IRA distribution can help.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

### 34. Maximize what you leave behind for your children; gift your IRA to your favorite Catholic organization.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

### 35. Give a gift to your favorite Catholic ministry; receive income for life.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

### 36. Give a gift that keeps on giving: perpetuate your annual contributions to our ministry.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)



37. Have you outgrown the need for your life insurance policy? Gift it to benefit our ministry.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

38. Leaving a gift of life insurance or retirement assets is as simple as changing beneficiaries.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

39. Interested in memorializing a friend or loved one?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

40. Need to increase your retirement income? A Charitable Gift Annuity or Charitable Remainder Trust can help.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

41. Making a lasting impact on a cherished Catholic ministry is not just for the wealthy.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

42. Gifting appreciated securities can provide great benefits to you and your favorite Catholic ministry.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

43. Do you want to perpetuate your family name?

To learn more, contact the planned giving experts at the Roman Catholic Foundation at  
314.918.2890 or [info@rcfstl.org](mailto:info@rcfstl.org)

44. Simplify your charitable giving by establishing a Donor-Advised Fund.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

45. What is a charitable checkbook? A Donor-Advised Fund. Start yours now!

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

46. You can give a sustaining gift to any endowment fund at any time, in any amount.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

47. Anticipating a large taxable event? We can help.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

48. Anyone can make a planned gift to sustain their favorite Catholic parish, school or ministry for generations.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

49. Interested in establishing your Catholic legacy?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

50. Would you like to sustain our ministry for future generations?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

51. Give a gift that costs you nothing during your lifetime and sustains our ministry for generations.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

52. Interested in an assured return for the rest of your life? A Charitable Gift Annuity might be right for you.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

53. How will you remember our ministry?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

54. Have you remembered our ministry in your estate plan?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.

314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

55. Interested in supporting our mission without impacting your lifestyle?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

56. Pay it forward: learn how to make a gift that will last for generations.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

57. Want your charitable gift to last for generations?

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

58. Can the average person leave an estate gift? Absolutely!

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

59. Bequests are the simplest way to make an impactful planned gift.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

60. Consider gifting your life insurance policy to benefit our ministry.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

61. By establishing a charitable gift annuity, you secure a fixed income, receive a partial tax deduction and benefit our ministry.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

62. Life insurance is an excellent tool for making charitable gifts.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

63. Honor or memorialize a loved one, friend or favorite teacher or pastor by establishing an endowment fund in their name.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

64. Planned giving: the creation of a gift, given now or upon the donor's death, as part of a financial or estate plan, which is funded with assets rather than current income.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

65. Learn how life insurance can provide you with an annual charitable deduction.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

66. Anyone, regardless of income or age, can make a planned gift to benefit our ministry.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

67. What are you waiting for? Contact us to learn how to make a planned gift.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

68. Did you know you can continue your annual giving to our ministry beyond your lifetime by making a planned gift? It's easier than you think!

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

69. Establish a donor-designated endowment fund with a gift of cash, securities or other assets.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

70. All funds at the Roman Catholic Foundation are invested in accordance with the social teachings of the Catholic Church.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

71. The Roman Catholic Foundation is here to help you identify your giving goals and plan your giving strategy.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

72. Your planned gift to our endowment fund at the Roman Catholic Foundation represents your hope for the future of our mission.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

73. You can't take it with you. Learn how to leave a portion of the gifts God has given you to His Church.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

74. Want to plan with heart and invest for the good of our organization? The Roman Catholic Foundation can help.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

75. Your planned gifts will ensure our organization continues to serve for generations.

To learn more, contact the planned giving experts at the Roman Catholic Foundation.  
314.918.2890 | [info@rcfstl.org](mailto:info@rcfstl.org)

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# Pulpit Announcements

*The following announcements are intended for parish use at Mass. Announcements can be made by the pastor or members of the Planned Giving and Endowment Building Team. Insert the names of your organization and fund where indicated.*

*Suggested use: One pulpit announcement per calendar quarter and monthly in the fourth quarter.*

1. I am pleased to announce that <<Parish>> has partnered with the Roman Catholic Foundation of Eastern Missouri to establish the <<Fund>>. This endowment fund is an important step toward sustaining our parish long into the future. We will receive perpetual annual distributions from this permanent fund, giving us financial security and ensuring that we are able to maintain our ministries now and for generations. Please consider remembering our parish with a planned gift to <<Fund>>. For more information, please contact the parish office or <<committee chair>>, planned giving committee chair.
2. Please remember our parish endowment fund. The <<Fund>> is held at the Roman Catholic Foundation and is stewarded according to Catholic moral values. Annual distributions from our parish fund allow us, now and for generations to come, to maintain the ministries our parish offers. Each of our parishioners, even those of modest means, can leave a sustaining gift to our parish fund that costs them nothing during their lifetime. To learn more, please contact the parish office or <<Planned Giving and Endowment Building Team Chair>>, chair of the Planned Giving and Endowment Building Team.
3. You can leave a gift to our parish that will sustain our mission even after your lifetime. We all want our parish to remain vibrant for our children, grandchildren and beyond. With a parish endowment fund that grows over time and provides annual distributions in perpetuity, this is entirely possible. Please consider leaving a planned gift to benefit our <<Fund>> to ensure that future generations receive the same blessings we have enjoyed. For more information, contact the parish office or <<Planned Giving and Endowment Building Team Chair>>, chair of the Planned Giving and Endowment Building Team.
4. Our parish endowment fund is very important to the long-term sustainability of our parish. You can help grow this fund with your planned gifts. While planned giving might sound complicated, it is actually quite easy. Anyone can do it. Regardless of your age or income, you can leave a gift to our parish fund that will help secure our ministries for generations. For more information, contact the parish office or <<Planned Giving and Endowment Building Team Chair>>, chair of the Planned Giving and Endowment Building Team.
5. Your generosity today can sustain our parish for future generations. Through our parish endowment fund, we can ensure that our parish remains strong even after our lifetimes. With your planned gift to benefit the <<Fund>>, annual distributions to the parish increase, and God's work continues to be performed through our parish ministries. To discuss your planned giving options and the impact you might make on our parish, contact the parish office or <<Planned Giving and Endowment Building Team Chair>>, chair of the Planned Giving and Endowment Building Team.

6. There are simple ways to leave a significant gift to our parish endowment fund. You can create a gift that will provide you with income for life while also sustaining our parish. You can also establish a gift that will cost you nothing during your lifetime. Best of all, with the assistance of the experts at the Roman Catholic Foundation, establishing such gifts is easy. It might be as simple as changing the beneficiary of your life insurance or retirement account. For details, contact the parish office or <<Planned Giving and Endowment Building Team Chair>>, chair of the Planned Giving and Endowment Building Team.
7. We partner with the Roman Catholic Foundation to sustain our parish through our parish endowment fund, the <<Fund>>. The Foundation can work with you to leave a substantial gift to our fund that will cost you nothing during your lifetime. Contact the parish office or <<Planned Giving and Endowment Building Team Chair>>, chair of the Planned Giving and Endowment Building Team.
8. As a Catholic community, we have been richly blessed with God's gifts. In truly appreciating our blessings, it is important that we remain mindful of those who came before us. Thanks to the stewardship of past generations, we are able to rejoice today as a strong, united parish in God's love. As the Church of today, we are likewise responsible for providing for the Church of tomorrow, working to secure for future generations the blessings we have enjoyed and more.
9. We have established the <<Fund>> in order to secure permanent funding to our ministry. We are very fortunate to have established this fund, but its level of impact depends on our dedicated parishioners. Please consider making a planned gift in support of our fund so that our children, grandchildren and beyond may enjoy the blessings of <<Parish>>. Please contact the parish office or <<Planned Giving and Endowment Building Team Chair>>, chair of the Planned Giving and Endowment Building Team.

# Customizable Endowment Fund Brochure

The following tri-fold endowment fund brochure can be customized to include your organization's name, logo and colors along with the name of your fund.

To customize and order your brochures, at your own cost, [please click here](#).

"ED QUAM SINCIUSDAM VOLUPTA NUS  
SEQUIS INCTE MAGNIET QUIBUST  
MOLLANDIT, OCCUS, NET LAUT ET ET  
EXPLAB IMAIORI DOLORIB." – **NAME**

<<Organization Logo>>

## YOUR PLANNED GIFT

To discuss which planned giving option is right for you, please contact the Roman Catholic Foundation at [giftplanning@rcfstl.org](mailto:giftplanning@rcfstl.org) or 314.918.2890.

<<FUND>>

*Invest Sustain  
Plan*

*Support Hope  
Give*

*Steward Strengthen  
Community*

## OUR MISSION

Lorem ipsum dolor sit amet consectetur adipiscing elit enim metus, ut massa auctor nisl suspendisse habitant per eu nunc, malesuada scelerisque lacinia eros eleifend penatibus senectus laoreet. Cum libero lacinia taciti mauris risus ultrices enim fringilla dui commodo pretium potenti, elementum metus tincidunt etiam vitae dapibus nec nulla sollicitudin urna.

<<FUND>>

Established with the goal of securing the long-term financial future of <<Organization>>, this fund ensures that our mission can be carried on for generations.

Our permanent fund is invested in accordance with the social teachings of the Catholic Church at the Roman Catholic Foundation of Eastern Missouri and will provide perpetual annual distributions that will support <<Organization>> long into the future.

## WHO CAN GIVE

Anyone—regardless of income or age—can make a planned gift to our fund. Your planned gift, made from assets rather than income, can make a tremendous impact on <<Organization>>, likely at no cost to you during your lifetime.

Tell them to do *good*, to be rich in *good works*, to *be generous*, ready to *share*, thus accumulating as treasure a *good foundation* for the future, so as to win the life that is *true life*.  
(1 Timothy 6:18-19)

## BENEFITS OF GIVING

By making a planned gift to our fund, you establish your charitable legacy and help secure the future of our mission for years beyond your lifetime. You may also receive tax benefits to offset your gift.

## WAYS TO GIVE

### GIVE NOW

Make an outright gift of cash, stock retirement assets or real estate.

### GIVE LATER\*

Leave a gift through a bequest in your will or trust or designate our fund as beneficiary of your life insurance or retirement accounts.

### GIVE AND RECEIVE

Make a gift and receive income for life or a term of years with a charitable gift annuity or charitable remainder unitrust.

For more details on these and other ways you can support our fund with a planned gift, please visit [rcfstl.org](http://rcfstl.org).

\*When giving later, please use the following title: Roman Catholic Foundation of Eastern Missouri (EIN 46-330922) for the benefit of <<Fund>>.

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# Ways to Support Our Fund Poster

*The following poster can be displayed in your organization's lobby or distributed as a flyer.*

*To request a customized version of this poster that includes the name of your fund, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

## 4 WAYS TO SUPPORT OUR ENDOWMENT FUND



### CASH OR STOCK

Give any amount, any time! Make checks payable to Roman Catholic Foundation of Eastern Missouri/  
\_\_\_\_\_ Endowment Fund. Gifts of stock are converted to cash, and the value is added to our fund. By donating appreciated stock, you can potentially avoid capital gains tax while supporting our ministry.



### BEQUEST IN YOUR WILL OR TRUST\*

You can include our organization in your will or estate plan; it's easy! You can designate a specific dollar amount or percentage of your estate as a gift to our endowment fund.



### LIFE INSURANCE OR IRA BENEFICIARY DESIGNATION\*

You can name our endowment fund as full or partial beneficiary of your life insurance policy or retirement account. This can be a smart way to make the most of your assets. Retirement funds, for example, are taxable when left to your heirs. By leaving other assets to your heirs and gifting retirement funds to our endowment fund, your retirement assets avoid taxes, and the entirety of your gift supports our ministry.



### CHARITABLE GIFT ANNUITY (CGA)

A CGA provides you with regular payments for life or a term of years. At maturity, the remainder is added to our endowment fund at the Roman Catholic Foundation. A minimum gift of \$10,000 is required to establish a CGA. Please contact the Roman Catholic Foundation for details | 314.918.2890.

\*If you wish to leave a gift to our endowment fund in your will or trust or would like to designate the fund as beneficiary of your life insurance or retirement account, please use the following title: Roman Catholic Foundation of Eastern Missouri (EIN 46-330922) for benefit of \_\_\_\_\_ Endowment Fund.



**Roman Catholic Foundation**

of  
EASTERN MISSOURI

314.918.2890 | [rcfstl.org](http://rcfstl.org)

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## Planned Gift Language – No Endowment with RCF

*The following document provides specific guidance for donors who wish to leave a gift to your organization's endowment fund. This document can be printed on your organization's letterhead and distributed along with mailings or brochures or as a standalone piece.*

*To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

We will need to customize this for each parish if no endowment

<<Fund>>

<<Organization>> is pleased to partner with the Roman Catholic Foundation of Eastern Missouri in building our endowment fund to sustain <<Organization's>> mission for future generations.

Please consider helping us build our fund by using one of the options below.

### Give Now:

- Online at [rcfstl.org/funds/](http://rcfstl.org/funds/)
- By check to: Roman Catholic Foundation/  
<<Fund>>

c/o Roman Catholic Foundation  
425 N. New Ballas Road, Suite 200  
St. Louis, Missouri 63141

- By transferring marketable securities. For instructions, please contact John Modder at 314.918.2894 or [john.modder@rcfstl.org](mailto:john.modder@rcfstl.org).

### Give Later:

- Give to our fund through your will or trust, or name the fund as beneficiary of your life insurance policy or retirement account by using the following: Roman Catholic Foundation of Eastern Missouri (EIN 46-330922), for the benefit of <<Fund>>.

### Give and Receive:

- Establish a Charitable Gift Annuity, receive a fixed income stream for life, and the remainder will be added to the <<Fund>> at maturity.
- Gift your highly appreciated assets to a Charitable Remainder Unitrust, receive payments for life or a term of years, and the remainder will be added to our fund at maturity.

For confidential assistance, please contact the Foundation's Gift Planning Officers at 314.918.2890 or [info@rcfstl.org](mailto:info@rcfstl.org).

*The Roman Catholic Foundation is a 501(c)(3) public charity, independent from the Archdiocese of St. Louis, that partners with Catholic parishes, schools, and ministries to sustain the local Church for future generations.*

# Planned Gift Intention Form

*The following form allows donors to indicate their planned giving intentions, making your organization aware of future gifts. If team members conduct personal visits with planned giving prospects, this form can serve as a “pledge card” on the visits.*

*To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

I am pleased to inform <<Organization>> that I intend to provide a legacy of support by making a planned gift through my:

- ☐ Will or trust ☐ Marketable securities
- ☐ Retirement account (Beneficiary Designation) ☐ Other \_\_\_\_\_
- ☐ Life insurance (Beneficiary Designation)

I want to direct my gift to:

\_\_\_\_\_ Endowment Fund.

\_\_\_\_\_ Endowment Fund.

As of this date, the approximate value of my gift is \$ \_\_\_\_\_.

This intention is not legally binding and may be modified or revoked at any time.  
<<Organization>> kindly requests notification any time you make changes or adjustments to your gift.

☐ YES ☐ NO I grant permission for my name to be used in promotional materials to inspire others to establish planned gifts.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Mobile

\_\_\_\_\_  
Email(s)

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## Planned Giving Content for Annual Appeal Response Devices

*The following lines are intended for use in annual appeal mailings. To keep planned giving at the forefront of donors' minds, include one or more of these lines in all of your organization's response devices.*

- ☐ In addition to my gift today, I would like to consider perpetuating my support with a planned gift. Please contact me to discuss my options.
- ☐ I have already included <<Organization>> in my estate plans.\*
- ☐ I would like to include <<Organization>> in my estate plans. Please contact me to discuss my options.\*
- ☐ I want to learn how I can perpetuate my annual giving to <<Organization>>.
- ☐ Please direct my enclosed gift to <<Endowment Fund>> to provide long-term support for <<Organization>>
- ☐ I want to learn more about my planned giving options.

\*When giving to our endowment fund through your will or trust or naming the fund as beneficiary of your retirement account or life insurance policy, please use the following title: Roman Catholic Foundation of Eastern Missouri (EIN 46-3309222) for the benefit of <<Fund>>.



**Roman Catholic Foundation**  
— of —  
EASTERN MISSOURI  
*Plan with heart. Invest for good.*

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# Roman Catholic Foundation

of  
EASTERN MISSOURI

## Assessing Your Planned Giving Prospects

While there is no exact science to determine your best planned giving prospects, the categories below may guide your solicitation efforts. Tally each donor's "points" and review the scoring metric to identify your top prospects.

| CATEGORY | POINTS |
|----------|--------|
|----------|--------|

### Age

|                   |   |
|-------------------|---|
| 80 and over ..... | 3 |
| 70 and over ..... | 2 |
| 60 and over ..... | 1 |
| Under 60.....     | 0 |

### Engagement with Organization

|   |   |
|---|---|
| Volunteer or Board Member .....                         | 3 |
| Past Volunteer or Board Member; still engaged .....     | 2 |
| Past Volunteer or Board Member; no longer engaged ..... | 1 |
| No history other than as a Donor .....                  | 0 |

### Giving History

|   |   |
|---|---|
| 9 of last 10 years (or more) .....                | 3 |
| 7 of last 10 years .....                          | 2 |
| 5 of last 10 years .....                          | 1 |
| Less than 5 of last 10 years/sporadic giver ..... | 0 |

### Marital Status

|               |   |
|---------------|---|
| Single .....  | 3 |
| Widowed ..... | 2 |
| Married.....  | 1 |

### Family Status

|                            |   |
|----------------------------|---|
| No children.....           | 3 |
| One child .....            | 2 |
| Two or more children ..... | 1 |

## SCORING METRIC

|   |              |
|---|--------------|
| Best candidates.....  | 10-15 Points |
| Potential candidates but will require nurturing .....               | 8-10 Points  |
| Least likely to consider a planned gift but continue engaging ..... | 0-7 Points   |

*FOR PARISHES: [Please click here](#) for instructions on extracting and assessing planned giving prospects from Servant Keeper.*

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## General Appeal Letter – No Endowment with RCF

*The following letter can be used as an introduction to a solicitation for planned gifts. It is written for parishes but can be edited to apply to schools or other ministries. The letter should be sent to planned giving prospects who do NOT receive a personal visit letter.*

*To request a Microsoft Word version of this document that you can customize for your use, and/or to obtain printed response devices to enclose with the letter, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

Dear <<Salutation>>,

As a Catholic community, we have been richly blessed with God's gifts. In truly appreciating our blessings, it is important that we remain mindful of those who came before us. Thanks to the stewardship of past generations, we are able to rejoice today as a strong, united parish in God's love. As the Church of today, we are likewise responsible for providing for the Church of tomorrow, working to secure for future generations the blessings we have enjoyed and more.

In effort to ensure lasting sustainability for <<Organization>>, we have established a Planned Giving Team in conjunction with the Roman Catholic Foundation. The purpose of our Team The committee's task will be to foster a culture of planned giving in our parish through education and marketing. Committee members include <<Names>>.

I invite you to consider establishing a planned gift to benefit <<Name of Organization>>. Making a planned gift that will provide financial support long beyond your lifetime is easier than you might think, and chances are, your gift won't affect your current lifestyle at all. There are giving opportunities that allow you to give after receiving an income stream for life and opportunities as simple as a bequest in your will or trust or a beneficiary designation of your retirement account or life insurance policy.

Enclosed you will find details of our fund and the ways to create a planned gift and a response card to indicate your interest. Please complete the card and return to our planned giving partner, the Roman Catholic Foundation of Eastern Missouri.

God bless you, and God bless the future of <<Organization>>.

<<Signature>>

<<Name>>

<<Title>>

<<Organization>>

If you wish to leave a gift to our endowment fund in your will or trust or would like to designate the fund as beneficiary of your life insurance or retirement account, please use the following title: Roman Catholic Foundation of Eastern Missouri (EIN 46-330922) for benefit of <<Fund>>.

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# Appeal Letter for Top Donors- No Endowment with RCF

*The following letter can serve as an “ask” when a committee member makes a visit with a planned giving prospect. Committee members may provide this letter as part of a larger packet of information (Customizable Endowment Fund Brochure, Ways to Give Summary, Planned Gift Intention Form) to be reviewed with the prospect during the visit.*

*To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

Dear <<Salutation>>

Your dedication to <<Organization>> has long been evident. Our Catholic community depends on strong individuals of faith like you to serve as a beacon of hope in the world. I want to thank you sincerely for your consistent gifts of time, talent and treasure to our ministry.

As such a strong supporter of our <<parish/school/ministry>>, you undoubtedly recognize the challenges and opportunities we face. Our goal of ensuring long-term sustainability for our <<parish/school/ministry>> is of vital importance. One great step we have made toward this goal is a Planned Giving Team in conjunction with the Roman Catholic Foundation. The purpose of our Team The committee's task will be to foster a culture of planned giving in our parish through education and marketing. Committee members include <<Names>>.

You might not realize that you can give a significant gift to our parish at no cost to you during your lifetime. There are many simple planned giving opportunities that allow for tremendous benefits both to you and our Church.

If, for example, from your estate you leave the parish just 25 times the amount you give annually to our <<parish/school/ministry>>, the amount of your annual gift will provide the parish with resources which will be prudently invested or utilized to maintain or enhance our mission. Many families opt to consider the Church as an additional child in their estate plans, and still others leave to the Church the biblical tithe (10 percent) from their estate.

Each of these possibilities, if executed, would make a tremendous impact on our parish for generations to come. I ask you, a devoted supporter of <<Organization>> to remember in your estate plans the Catholic community to which you have given so much during your life. Please consider establishing a planned gift in support of <<Parish Name>>. Should you need additional information, our Planned Giving and Endowment Building Team is happy to assist, or the experts at the Roman Catholic Foundation (314.918.2890) can provide confidential guidance. Thank you for your support of <<Organization>>.

In Christ,

<<Signature>>

<<Name>>

<<Title>>

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## Personal Visit Letter for Top Donors – No Endowment with RCF

*The following letter is intended for top planned giving prospects and paves the way for committee members to make personal visits. Mail this letter to your top planned giving prospects only in advance of team members calling to schedule visits.*

*To request a Microsoft Word version of this document that you can customize for your use, please contact the Foundation at [info@rcfstl.org](mailto:info@rcfstl.org).*

Dear <<Salutation>>,

As a Catholic community, we have been richly blessed with God's gifts. In truly appreciating our blessings, it is important that we remain mindful of those who came before us. Thanks to the stewardship of past generations, we are able to rejoice today as a strong, united parish in God's love. As the Church of today, we are likewise responsible for providing for the Church of tomorrow, working to secure for future generations the blessings we have enjoyed and more.

In effort to ensure lasting sustainability for <<Organization>>, we have established a Planned Giving Team in conjunction with the Roman Catholic Foundation. The purpose of our Team The committee's task will be to foster a culture of planned giving in our parish through education and marketing. Committee members include <<Names>>.

The committee and I would welcome the chance to share additional information with you about our fund and the planned giving opportunities available and to answer your questions. I or a member of our committee will contact you soon to schedule a time in the coming weeks to discuss, in person, this important step in securing the future of our parish and your potential participation. Thank you for your consideration.

God bless you, and God bless the future of <<Parish>>.

<<Signature>>

<<Name>>

<<Title>>

<<Organization>>

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# How to Ask for Planned Gifts to Support the Endowment Fund

## Step 1: PHONE CALL

Before meeting with a planned giving prospect, you must first make a phone call to introduce yourself and schedule a visit. Remember, prospects should have received a "personal visit letter" prior to your initial phone call. This letter paves the way for you to schedule a visit.

### Talking points

- Introduction/thank you
- Mention pre-visit letter
- Reiterate main points of the letter
  - o We have established <<Fund>> as a permanent source of funding for our mission
  - o To increase the endowment fund, we have established a Planned Giving and Endowment Building Team
  - o Team members are reaching out to our most dedicated supporters to discuss this step in securing our organization's future
- Express desire to visit on behalf of the Planned Giving and Endowment Building Team
- Explain purpose of the visit
  - o Learn how prospect is engaged in the ministries and programs of the organization
  - o Educate prospect about <<Organization's>> endowment fund(s)
- Schedule the visit
  - o Suggest meeting in the prospect's home; the parish is another option if preferred
  - o Suggest two or three specific dates/times
- Handling a NO response
  - o Gently inquire about the reason
  - o Suggest you can call back in 6 months if now is not a good time to discuss

## Step 2: PERSONAL VISIT

### Agenda/Talking Points

- Introduction (5-10 mins)  
*Goal: Establish rapport*
  - o Greet the prospect and thank them for allowing time for you to visit. Start with a prayer.
  - o If you don't know the prospect, find something in common to begin the conversation. At minimum, you can acknowledge you are both supporters of <<Organization>>.
- Discovery (10-15 mins)  
*Goal: Learn about prospect's desires with regard to their stewardship with the Church*
  - o Engage prospect in conversation about their lives and the role of their Catholic faith and <<Organization>>; how are they involved in ministries?
  - o Discuss how prospect would like to be remembered and the difference they would like to

make for future generations.

- Ask open-ended questions that will help prospect share their values and what is important to them when it comes to their engagement with their faith, <<Organization>> and their Christian stewardship. See samples below:
  - You've long been involved with <<Organization>>; what attracted you to get involved? Why have you stayed?
  - Is there a ministry or program at <<Organization>> that has been important to you over the years?
- Listen closely for values that align with long-term goals of the organization to discern ways the organization to make this connection in the next phase of the visit
- Ask the final discovery question, which sets up the last portion of the visit:
  - Have you thought about how you would like to be remembered with regard to your Catholic faith and support of the Church?

- **Advocacy and the "Ask" (5 mins)**

*Goal: Educate prospect about the endowment fund(s)*

- Bring out literature that promotes Planned Giving. Point out how Planned Giving aligns with the prospect's needs and wants for supporting the Church.
- Share your story about why you made a planned gift
- Ask, on behalf of <<Organization>>, if prospect would consider leaving a planned gift to sustain the mission of <<Organization>> long into the future.
- Hand prospect the folder/packet (includes appeal letter for top donors, customizable endowment fund brochure, Ways to Give Summary and Planned Gift Intention Form). NOW STOP TALKING AND LISTEN!

- **Handling the Response (10 minutes)**

*Goal: Listen to prospect's thoughts and take appropriate action*

- Resist the urge to speak after making the ask. Prospects need time to absorb the request and tell you what is on their mind.
- Potential Responses:
  - "We've already included <<Organization>> in our will or estate plan."
    - Thank the donor!
      - If the organization has an endowment fund, be sure they understand the difference between leaving a gift directly to <<Organization>> (short-term funding) and leaving a gift to <<Fund>> (long-term funding).
      - Ask if they will complete the intent for planned gift form so <<Organization>> can have accurate record of their gift intentions.

- “We’re not ready to make a decision right now; we’re in the process of planning/revising our estate plan.”
  - Thank the prospect for their time. Ask when might be a good time to follow up. Make a note in your calendar to call again.
- “We’d like to leave some money to the Church but are worried about outliving our financial resources or being a financial burden to our children.”
  - If the organization has an endowment with the Foundation, inform prospect that there are giving options that allow donors to leave substantial gifts after their lifetime *and* receive reliable income during their lifetime. Ask if you may pass their contact information on to the Roman Catholic Foundation, who can assist them in planning such gifts.
- We appreciate the information you’ve shared with us, but we are not interested in adding the Church to our will at this time.”
  - Thank the donor for their time. Let them know that they can contact you at any time with any questions about the Planned Giving and Endowment Building Program.

### Step 3: FOLLOW-UP

- Record information about your visit and share with Planned Giving and Endowment Building Team. (Maintaining a master spreadsheet is suggested.)
- Send prospect a follow-up note thanking them for the visit and summarizing any agreements reached (e.g., “Per our visit I will check back with you in 6 months after you’ve revised your estate plan to see if we can assist in planning your gift.
- Maintain a positive outlook.
  - Building a successful Planned Giving and Endowment Building Program is a marathon, not a sprint. It will take time to educate prospects on the value of endowment funds and planned gifts for the future.