

The Process of Legacy Gifting

- Have you considered leaving a gift to the parish in your will or estate plan but didn't know where to start?
- Have you ever considered making a charitable gift to memorialize a loved one or to honor a family member?
- Did you know that the process might be easier than you think?

Creating a legacy can be a simple process and ensures that your gift will forever benefit the church, school or ministries that are important to you. There are a number of ways to leave a gift for the future for St. John the Baptist while creating a legacy for your family at the same time.

How Do I Start the Process?

The key to making the most of charitable gifts is to begin by considering what you want to accomplish. A small amount of time devoted to deciding *what* to give, *when* to give, and *how* to give can make a real difference when deciding *how much* to give. Talk this over with your family, your estate attorney or your financial advisor, or call the parish office and request a Legacy Gifting packet for additional information.

Things to Consider When Considering Making a Planned Gift

- What charitable causes are most important to me?
- How do I want to be remembered?
- What lessons do I want to impart to my children?
- Is there a best way to incorporate charitable giving into my overall financial plan?
- What are my charitable giving choices?

Legacy Gift Suggestions

Gift of a Permanent Endowment

- A gift of \$5,000 or more allows an individual or family to establish an endowment for the parish or for a specific ministry. This will provide annual support in perpetuity and can be named in honor or in memory of someone. The endowment can be established during life or defined through your will and funded at death.
- Contact the parish office or the Diocesan Foundation office for more information or to establish an endowment.

Benefiting Others Through Your Will

- When making a specific bequest, you are directing that proceeds from your estate will benefit the parish, school or other ministry. Your estate-planning attorney can help with this designation.
- Naming St. John the Baptist as a Beneficiary of a life insurance policy or your IRA can be done by simply making the indication on these policies.

Making a Gift While Providing for Loved Ones

- Gifts such as a Charitable Gift Annuity provide income for you or a loved one during one or two lifetimes while leaving a gift to the parish or school upon your death. There may also be lifetime charitable contribution deductions.
- Contact the parish office or the Diocesan Foundation office for more information.

Living Legacy Society

St. John the Baptist Catholic Parish

625 FRAME ROAD • NEWBURGH, IN 47630-1604 • 812-853-6181 • FAX: 812-853-6182

Internet: www.sjbnewburgh.org

