

We All Want Significant, Happy and Fulfilled Lives

We want to make a difference and leave a lasting mark for those most dear to us and to the world.

What legacy will you leave?

A bequest is perhaps the easiest way to make a lasting impact on people and organizations that mean the most to you. A bequest is an easy and effective way to gift a charity.

An Easy Gift to Make

A charitable bequest directs a gift to be made to charity when you pass away. It benefits you in furthering the good work of an organization you support long after your lifetime. You can also save estate taxes with a charitable deduction.

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

For More Information

- I have already included the church in my will.
- I would like to speak with someone who can provide additional information.
- I would like to receive information on other charitable tax planning options.

The best way to contact me is by:

- Email
- Mail
- Telephone

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

Parish _____

Please complete and return to the address listed below. All inquiries are treated with complete confidentiality.

Abe Saadeh, Chief Development Officer
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Help to Fulfill Your Lasting Legacy: with a Charitable Bequest



The Catholic Foundation
of the DIOCESE of SACRAMENTO, INC.

What legacy will you leave?

Including a bequest in your will or trust will support your estate plan, and through your charitable bequest you will leave a lasting mark.

As you steward your gifts we ask that you consider your parish or favorite parish ministry. Here are some common ways to make a bequest:

Bequest of an IRA

An IRA account makes an excellent bequest to charity. If the IRA were given to your family, much of the value would be depleted through estate and income taxes. By designating a charity as the beneficiary of part or all of your IRA, the full value of the gift is transferred tax free at your death and your estate receives a charitable deduction.

Bequest of a Life Insurance Policy

A life insurance policy is an easy way to make a bequest to charity. It is free and easy to name a charity as a beneficiary of a life insurance policy.

A bequest is one of the easiest gifts to make. With the help of an advisor, you can include language in your will or trust specifying a gift to be made to family, friends or a charity, such as your parish or parish school.

A bequest may be made in several ways:

- ▶ Gift of a percentage of your estate
- ▶ Gift of a specific dollar amount
- ▶ Gift of a specific asset
- ▶ Gift of the residue of your estate

How do I include the Church in my will?

As with any legal document, the proper language is essential:

I give to the Roman Catholic Bishop of Sacramento, for the benefit of (parish name and/or diocese) located in (city), (%) of my residuary estate (or specific dollar amount).

The Poor Widow's Contribution

He sat down opposite the treasury and observed how the crowd put money into the treasury. Many rich people put in large sums. A poor widow also came and put in two small coins worth a few cents. Calling his disciples to himself, he said to them, "Amen, I say to you, this poor widow put in more than all the other contributors to the treasury. For they have all contributed from their surplus wealth, but she, from her poverty, has contributed all she had, her whole livelihood."

Mark 13:41-44

