

## HOW SHALL I MAKE A RETURN TO THE LORD FOR ALL HE HAS DONE FOR ME?

 PSALM 116:12

Creating a Catholic Legacy through your will or estate plan is a significant way to thank the Lord for all of life's blessings.

The church has been part of your life since baptism and the significant events throughout your adulthood. In leaving a legacy to the parish endowment fund, you can pass along your Catholic heritage and values for future generations.

Additionally, gifts can be made now to grow the endowment. Memorial gifts and honorarium gifts are a good way to do so.

### ASSETS YOU CAN USE TO MAKE A PLANNED GIFT:

- † Cash
- † Retirement accounts
- † Securities
- † Real estate
- † Insurance
- † Collectibles

The Catholic Foundation of North Georgia helps parishioners with their gift planning and gives them the opportunity to make gifts from their assets to the church. We will assist you in determining the best gift for your situation.

Your parish photo  
to be placed here

Our parish endowment fund is held and managed at the Catholic Foundation of North Georgia. Gifts to an endowment fund are never spent but are invested to produce distributions to the parish forever.

The Catholic Foundation exists to help Catholics who want their gifts to have a lasting impact on parishes, schools and other Catholic organizations that mean the most to them.

The mission of The Catholic Foundation of North Georgia is to support the ministries of the Catholic community through the effective long-term management of endowment funds and the encouragement of stewardship.

For assistance creating your legacy or for additional information about making a Planned Gift to our parish endowment fund contact:

#### THE CATHOLIC FOUNDATION OF NORTH GEORGIA

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*Creating Catholic Legacies*



The CATHOLIC  
FOUNDATION  
OF NORTH GEORGIA

## LEAVING A LEGACY FOR YOUR PARISH NAME ENDOWMENT FUND



The CATHOLIC  
FOUNDATION  
OF NORTH GEORGIA

Your parish photo  
to be placed here

The Catholic Foundation of  
North Georgia can show you  
how to help, now and forever.

# How You Can Help Build Your Parish Endowment Fund.

Create a legacy that will benefit your parish now and forever.

YOUR GIFT	WILL/BEQUEST	RETIREMENT PLAN ASSETS	LIFE INSURANCE	CHARITABLE GIFT ANNUITY	CHARITABLE REMAINDER TRUST	CHARITABLE LEAD TRUST	REAL ESTATE
<b>YOUR GOAL</b>	<p>Simplest way to leave a legacy.</p> <p>Maintain control of assets during your life.</p> <p>Make a gift to benefit your parish at your death.</p>	<p>Continue receiving funds during your life.</p> <p>Can change mind during life.</p> <p>Satisfaction of knowing your money will help your parish for years to come.</p>	<p>Make a significant gift with less cash.</p> <p>Reduce estate tax.</p> <p>Give a paid up policy during life or you can create a new policy.</p>	<p>Receive fixed income for life.</p> <p>Make a gift to the parish at death.</p>	<p>Transfer property without paying capital gains tax.</p> <p>Enjoy regular income for life or a term of years.</p> <p>Would like a tax benefit.</p> <p>Make a gift to your parish endowment at death.</p>	<p>Give cash or property to your family in the future.</p> <p>Avoid substantial gift or estate tax.</p> <p>Give to your parish endowment fund for a fixed number of years.</p>	<p>Remain in home during life.</p> <p>Receive a charitable income tax deduction.</p> <p>Give home to parish at death.</p>
<b>HOW IT WORKS</b>	<p>Designate the parish endowment fund as a beneficiary of your estate through your will.</p> <p>It can be a sum of money, property, or a percentage of the remainder of your estate.</p> <p>Estate tax or charitable deduction.</p>	<p>Donor names parish endowment fund as the primary or partial beneficiary of retirement account.</p>	<p><b>FOR NEW POLICIES:</b></p> <p>Make CFNGA the owner and your parish endowment the beneficiary.</p> <p>Donor is the insured.</p> <p>CFNGA pays premium.</p> <p>Donor pays CFNGA premium amount.</p>	<p>Transfer cash or securities to CFNGA in exchange for a contract to pay you a fixed income (rates based on age) for the rest of your life.</p> <p>At death remainder goes to your parish endowment.</p> <p>Requires a minimum of \$10,000.</p>	<p>Transfer cash or property to fund a CRT.</p> <p>Trust sells property tax-free.</p> <p>Provides income for life or a fixed number of years from invested money. Upon death, the remainder goes to your parish endowment fund.</p>	<p>Transfer cash or property to the trust.</p> <p>The trust pays a percent to the parish endowment fund for a number of years.</p> <p>Family receives remainder at end of designated years with substantial tax savings.</p>	<p>Give your property to the parish endowment fund but retain the right to use the property during your life.</p> <p><b>OR</b></p> <p>Will your property to your parish endowment fund.</p>
<b>BENEFITS</b>	<p>Use and own property during life.</p> <p>Gift is revocable.</p>	<p>Receive income during life.</p> <p>Charitable tax deduction.</p> <p>Dependents avoid ordinary income tax assessments on amount paid to parish.</p>	<p>Give a large gift with less money.</p> <p>Insurance gift is removed from your estate.</p> <p>Charitable tax deduction for donated premium.</p>	<p>Fixed income for life.</p> <p>Immediate tax deduction.</p> <p>Partial bypass of capital gains tax.</p> <p>Payments partially tax-free.</p>	<p>Charitable tax deduction.</p> <p>Income for life or term of years. Avoid capital gains tax.</p> <p>Possible growth of income over time if unitrust.</p>	<p>Gift and/or estate tax deduction.</p> <p>Asset appreciation passes to family at reduced cost.</p>	<p>Charitable tax deduction during life.</p> <p>Lifetime use of property.</p> <p>Proceeds from sale go to the parish endowment fund.</p>

Memorial gifts may also be made to your parish endowment fund through The Catholic Foundation of North Georgia.