



THE CATHOLIC
COMMUNITY FOUNDATION

We
Gather

LEGACY GIVING

While all our supporters share a strong desire to give and make an impact in the community, each of them does it in a unique way. Some are pleased with the level they can give now, and others get great satisfaction from knowing that they will make a bigger impact after their lifetime through a legacy gift. Both **Current Giving** and **Legacy Giving** make our institutions stronger, more sustainable and better prepared to reach future generations. We invite you to learn more about Current Gifts by contacting the Foundation or visiting catholiccf.org/give-now

We are proud to offer our donors many giving options to help them create a thoughtful, flexible giving plan that matches their specific giving interests and financial circumstances. A Legacy Gift is made to an organization in the context of your estate planning after your lifetime. During the process of planning for the disposition of your total accumulated assets, this gift is usually included in a written statement as part of your overall intentions. If carried out with discernment, a legacy gift becomes an expression of your deepest values and stewardship. Legacy Gifts can be executed through numerous vehicles: a will or trust, retirement account, insurance policy, financial accounts, charitable remainder trust (CRT) and more.

catholiccf.org/legay-planning

Honor the LORD with your wealth, with first fruits of all your produce; Then will your barns be filled with plenty, with new wine your vats will overflow. Proverbs 3:9-10

Gather

Grow

Give



Legacy Gifts are for Everyone

Many times, when people hear the words “estate planning” or “legacy gift,” they think “I’m not rich – that doesn’t apply to me.” At the Foundation we know that simply is not true – legacy gifts of any amount are always welcomed and deeply appreciated. Leaving a “modest” amount (“I want to give \$3,000 to my parish and the rest is for my family”) or “small” percentage (“5% of the value of my home should be donated to charity”) will still have a big impact on the organizations you love.



Blended Gift

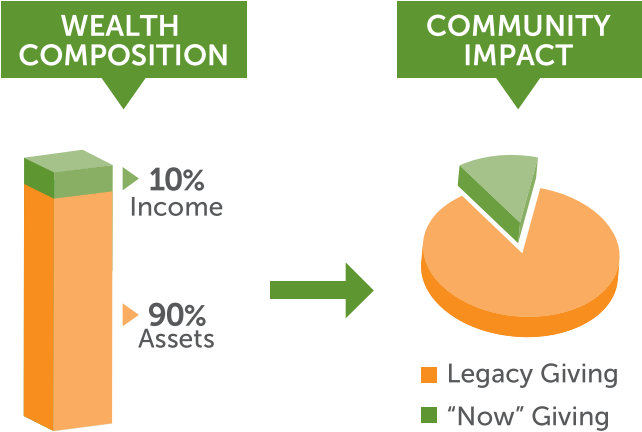
Current and legacy giving are not “either/or” decisions. Many people would like to give more to the causes they love today but are limited by the expenses of everyday life. For most people, the majority of one’s wealth is tied up in assets which is why legacy giving can bring great joy. Legacy Gifts come from the donor’s assets after their lifetime and are usually much larger than what that donor was able to give during their lifetime.

If part of your legacy giving includes a gift of any size to a local parish, Catholic elementary school, the Diocese, or any ministry of the Diocese, you are welcome to join the Society of Saint Joseph, an honorary legacy society for the Diocese of San José. To learn more, contact the Foundation or visit catholiccf.org/SocietyofSaintJoseph

Legacy Giving and Endowments

An endowment is often the perfect recipient of a Legacy Gift. Endowments provide stable, permanent support for the organizations we love. By directing your Legacy Gift to an endowment, you can help support an organization you love **FOREVER**. Your gift will always remain a part of the endowment because the corpus of the fund is never spent – only the earnings are used for annual grants.

This information is not intended as tax, legal or financial advice. Consult your personal advisors for information specific to your situation.



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