



My Catholic Legacy Gift

This notice serves as confirmation of my Catholic Legacy Society gift to a parish, school, cemetery, organization, or ministry within the Archdiocese of Kansas City in Kansas.

Name _____ Parish _____

Address _____ City, State _____ Zip _____

Phone _____ Email _____

Birthdate (mm/dd/yyyy) _____ Spouse's birthdate _____

I have designated _____ to receive a gift from my estate.

Please describe your deferred gift (or attach a copy of the documentation, if you prefer):

Will Revocable "Living" Trust IRA or Other Retirement Account Life Insurance

Charitable Remainder Trust Donor Advised Fund Charitable Gift Annuity

Real Estate TOD/POD Account Other: _____

Name on Account: _____

Company name where account is held: _____

Company address _____

Company phone _____

How would you like the named entity to use your gift?

Endowment (only interest income from my gift may be used)

Current Operating/Unrestricted Other restriction (please specify) _____

If you are comfortable doing so, please provide an estimate of the current value of your deferred gift. This estimate will help with planning for the future. Estimate: _____ Percent of Estate: _____

Anyone who notifies the Church that they are a recipient of a gift in their estate plan qualifies as a member of the Catholic Legacy Society (CLS). Gift details are always held in strict confidence.

May your name(s) be included in donor rosters of Catholic Legacy Society members?

Yes, you may print my/our name(s) in Legacy Society listings published by the Catholic Foundation of Northeast Kansas.

List as: _____

No, I wish to remain anonymous. Please do not print my/our name(s) in Catholic Legacy Society listings.

Signature: _____ Signature: _____ Date: _____

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit the Church and her ministries in the future. Gifts of any size are always appreciated.



Six Simple Ways to Make a Gift at Death

Provided by the Office of Stewardship and Development of the Archdiocese of Kansas City in Kansas

1) Specific Bequest

This is a gift of a specific item to a specific beneficiary. For example, "I give my house to <parish name, city, state>." If that specific property has been disposed of before death, the bequest fails and no claim can be made to any other property.

2) General Bequest

This is usually a gift of a stated sum of money. It will not fail, even if there is not sufficient cash to meet the bequest—even if other assets need to be sold. For example, "I give \$50,000 to <parish name, city, state>."

3) Percentage Bequest

Using percentages can be a simple way to ensure that heirs benefit proportionately if your estate grows or shrinks during your lifetime. "I give, devise, and bequeath 10 percent of my estate to <parish name, city, state>." This is a convenient way of making sure your heirs and those charities you support share in equal shares. "I give, devise, and bequeath my estate to each of my three children and <parish name, city, state> in equal shares."

4) Endowed Bequest

This bequest allows you to restrict the principal of your gift, requiring the funds to be held permanently and only the income they generate may be used. Ask the charitable recipient or the Catholic Foundation of Northeast Kansas (CFNEK) if they already have a named endowment fund. If so, you may identify the recipient as the Catholic Foundation of Northeast Kansas for the benefit of the fund by name as the recipient of the gift. "I give \$20,000 to <Catholic Foundation of Northeast Kansas for the benefit of parish name endowment fund, city, state>," or "I give \$20,000 as an endowed gift to <parish name, city, state>."

5) Beneficiary Designation

One of the simplest and cheapest ways to add charity to your estate plan is to change a beneficiary designation on retirement assets, IRAs or Life Insurance. A gift made this way does not pass through probate, and there is no charge to make these changes. Any asset with a beneficiary designation can have a full, partial, or contingent beneficiary. Consult your plan administrator or insurance company for a beneficiary change form. Simply insert the charity name and address into the form. If the full name doesn't fit in the space provided, ask for help from the company providing the form or the Archdiocese.

6) Transfer on Death (TOD) or Pay on Death (POD)

TOD or POD designations are available on many bank accounts and real estate. These designations can be used as an efficient way to transfer assets to your desired beneficiary. Just enter the name of the charity on the TOD or POD. The form may require a tax ID for the recipient charity that can be obtained from the designated charity.