

PLANNED GIVING BULLETIN, WEBSITE AND NEWSLETTER COPY

Please edit as required to serve individual parish/school circumstances. Use on a rotating basis, but please try to include something in your bulletin each week.

So Long, 2022! Four Ways to Celebrate with Tax Savings

As you get ready to toast the new year consider these smart ways to wrap up 2022 on a financial high note. 1. Contribute appreciated assets (stock, mutual funds, cryptocurrency, real estate, mineral interests) instead of cash. 2. Sell depreciated assets and donate the cash. 3. If you are 70-1/2 or older, take a qualified charitable distribution from your IRA. 4. If you are 59-1/2 or older, take a distribution from your retirement plan and then make a donation to our parish, a Catholic school or the Diocese of Fort Worth without an early withdrawal penalty. For more information, please visit <https://bit.ly/CatholicLegacy> or contact **Renée Underwood, CFRE** at the Advancement Foundation runderwood@adv-fdn.org or 817-533-7242.

A Gift in Your Will or Living Trust

Interested in supporting our parish, a Catholic school or the Diocese of Fort Worth in our mission but feel overwhelmed by the thought of writing another check or giving up your assets today? A simple, flexible and versatile way to ensure we can continue our work for years to come is a gift in your will or living trust, known as a charitable bequest.

By including a bequest to the Catholic Diocese of Fort Worth Advancement Foundation in your will or living trust, you are ensuring that we can continue our mission for years to come. Please visit <https://bit.ly/CatholicLegacy> for more information, including bequest and beneficiary designation language. Or, contact **Renée Underwood, CFRE** at the Advancement Foundation runderwood@adv-fdn.org or 817-533-7242.

Leave a Legacy to Our Parish

When you designate our parish, a Catholic school or the Diocese of Fort Worth in your will, or as a beneficiary of a life insurance policy, retirement plan or bank account, you are leaving a legacy that will impact generations of Catholics long into the future. Please visit <https://bit.ly/CatholicLegacy> for more information, including bequest and beneficiary designation language. Or, contact **Renée Underwood, CFRE** at the Advancement Foundation runderwood@adv-fdn.org or 817-533-7242.

Donate Stocks or Other Appreciated Assets to Support Our Parish

Make a bigger impact by donating long-term appreciated securities, including stock, bonds, mutual funds, real estate or mineral interests, directly to the Advancement Foundation for the benefit of our parish, a Catholic school, the Annual Diocesan Appeal or other ministry. By donating directly to us, you allow the Church to receive the full pretax value of those appreciated assets and you avoid capital gains taxes.

Please visit <https://www.advancementfoundation.org/ways-to-give> for more information, including a form for Electronic Transfer of Stock. Or, contact **Renée Underwood, CFRE** at the Advancement Foundation runderwood@adv-fdn.org or 817-533-7242.

Support Our Parish (School) Endowment

NAME Parish (School) is fortunate to hold several endowments with the Advancement Foundation that provide a perpetual stream of income. (DESCRIBE HERE THE NAMES AND PURPOSES OF ANY ENDOWMENTS). To make a tax-deductible contribution to our endowment fund, please visit <https://bit.ly/DonateEndowment>. Your contribution may be designated in honor of or in memory of a loved one. If you are interested in establishing a new named endowment to benefit our parish, school or another ministry, please visit <https://bit.ly/CatholicLegacy> or contact **Renée Underwood, CFRE** at the Advancement Foundation runderwood@adv-fdn.org, 817-533-7242.

Support Our Parish through a Charitable Qualified Distribution (QCD)

If you are age 70½ or older, you can donate up to \$100,000 from your IRA directly to the Catholic Diocese of Fort Worth Advancement Foundation – to support our parish, a Catholic school, the Annual Diocesan Appeal or another ministry of the Diocese of Fort Worth – without having to pay income taxes on the money.

Have your broker make your check payable directly to the Advancement Foundation and include a note about how it should be credited. Please mail the check to **201 Main, Ste. 1198, Fort Worth, TX 76102-3105**. For more information about *Building Your Legacy*, Please visit <https://bit.ly/CatholicLegacy> or contact **Renée Underwood, CFRE** at the Advancement Foundation runderwood@adv-fdn.org, 817-533-7242.

Gifts of Mineral Interests

A gift of mineral rights, whether an entire or undivided fractional interest, can significantly impact a parish, school, ministry or the Diocese of Fort Worth and provide tax benefits for you. These interests may be given outright during your lifetime or through your estate. The Advancement Foundation is fully staffed to manage oil and gas assets in-house to help you achieve your charitable goals. To get started please contact **Renée Underwood, CFRE** at 817-533-7242 or email us at plannedgiving@adv-fdn.org.

Gifts That Pay You Income

There's a way for you to support our parish, a Catholic school, the Diocese of Fort Worth, Catholic Charities or another ministry and feel confident that you have dependable income in your retirement years. A charitable gift annuity can provide you with regular payments and allow us to carry out the mission of Jesus Christ. You can also qualify for a variety of tax benefits, including a federal income tax charitable deduction when you itemize. To learn more about Charitable Gift Annuities, please visit <https://bit.ly/CatholicLegacy> or contact **Renée Underwood, CFRE** at the Advancement Foundation runderwood@adv-fdn.org, 817-533-7242.

Have You Made Provisions for Our Parish (School) In Your Estate?

If you have included our parish (school) in your estate plans, will you please do us the favor of letting us know? We want to include you in the Legacy Society. Established in 2005, the purpose of the Legacy Society is to acknowledge and honor those individuals who make a permanent gift to benefit the Diocese of Fort Worth through a planned gift or who create an endowment fund. Specific parishes, schools, agencies or ministries may be designated beneficiaries. To let us know of your intent or to download your free personal estate planning kit, please visit <https://bit.ly/LegacyIntent> or contact **Renée Underwood, CFRE** at the Advancement Foundation, 817-533-7242, runderwood@adv-fdn.org.

Year-End Giving

As this year draws to a close, you are likely to be reviewing your important financial matters, including your charitable giving for 2022. Now is certainly a good time to think carefully about *what* to give and *when* to give it. It is also an important time to reflect on the call to Stewardship – to give back to God in gratitude. Please remember the parishes, schools and many ministries of the Diocese of Fort Worth now and in the future. Gifts of cash, IRA distributions, securities, insurance policies, bequests, annuities and trusts can make a lasting difference.

For more information about *Building Your Legacy* through planned gifts, Please visit <https://bit.ly/CatholicLegacy> or contact **Renée Underwood, CFRE** at the Advancement Foundation, 817-533-7242, runderwood@adv-fdn.org.