

Gifts of Retirement Assets

Put your money where your faith is - first



**Trinity Catholic
Schools Foundation**

Beneficiary Designation Gifts from your Retirement Accounts

Donating part or all of your unused retirement assets such as a gift from your IRA, 401(k), 403(b), pension, other tax deferred plan is an excellent way to make a gift to support the Trinity Catholic Schools endowment fund. If you are like most people, you probably will not use all of your retirement assets during your lifetime.

The benefits of making a gift of retirement assets are :

1

You avoid potential estate tax on retirement assets.

2

Your heirs would avoid income tax on any retirement assets funded on a pre-tax basis.

3

You receive a potential estate tax savings from an estate tax reduction.



To make a gift from your retirement assets, you will need to contact your investment firm and fill out their paperwork.

Also, please contact our office at 701-483-6085 to inform us of this gift.

Scan to Donate



**Trinity Catholic Schools
Endowment Fund**