

PLACE PARISH LOGO HERE

Types of Planned Gifts

GIVE NOW

DONOR-ADVISED FUNDS
Simplify your charitable giving and become eligible for a tax deduction when you make contribute to establish or add to your fund.

IRA CHARITABLE ROLLOVER
If you are required to take distributions from your IRA, you can give any amount (up to a maximum of \$100,000) per year from your IRA directly to a qualified charity such as <<parish>> without having to pay income taxes on the money. This popular gift option is also referred to as a qualified charitable distribution, or QCD for short.

ENDOWMENT FUNDS
Create an endowment fund with the Catholic Foundation – Diocese of Austin to provide a permanent source of income to the parish in accordance with the wishes of the organization or individual. You may qualify for a tax deduction.

GIVE LATER

GIFTS IN WILLS OR LIVING TRUSTS
A simple, flexible and versatile way to ensure the parish can continue its mission for years to come is through a gift in your will or living trust. This can be accomplished without affecting your assets during your lifetime and can be done with a gift of a specific amount or percentage of your estate, the residual value of your estate or a specific piece of property.

BENEFICIARY DESIGNATIONS
You can name the parish as a beneficiary to your retirement plan assets and life insurance policies. Remember that these assets pass on outside your will.

You simply fill out a form with your financial institution that is entirely separate from your will—which makes this approach an easy way to give. Not only is it an easy way to give, but it's also flexible—you aren't locked into the choices you make today. You can review and adjust beneficiary designations anytime you want.

GIFTS THAT PROVIDE INCOME

CHARITABLE REMAINDER TRUSTS
Gift your highly appreciated assets, such as stock or real estate to the parish, and you or your chosen beneficiaries receive payments for life or a term of years. With your gift, you may become eligible for a partial tax deduction. When the trust matures, its remaining assets are distributed to the parish.

OTHER TYPES OF GIFTS

REAL ESTATE

Depending on the gift method, you may enjoy tax savings, lifetime benefits, or relief from holding costs. When considering a real estate gift, we need to know the type of property you would like to donate as well as how you prefer to structure your gift.