



Ways to Support Our Planned Giving Program

The following information can be distributed as a flyer and/or displayed in your parish's lobby.

7 Ways to Support <<Parish Name>> with a legacy gift that will help support our mission for many years to come.

Cash

A gift of cash is a simple and easy way for you to make a gift.

Gift in Will or Trust

Consider leaving a gift to <<parish name>> in your will. The Diocese of Austin has partnered with FreeWill to give you a free, easy way to write your legally valid last will and testament. Learn more by clicking [here](#).

Life Insurance or Retirement Account Beneficiary Designations

You can name <<parish>> as a beneficiary to receive assets such as retirement plans and life insurance policies after you're gone. You simply fill out a form 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.

Endowment Fund with the Catholic Foundation – Diocese of Austin

An endowment gift to today provides a brighter picture for our future. When you make a gift to the parish through a permanent endowment, you give a gift with both immediate and long-term benefits.

Here's how it works: Endowment donations are invested. A portion of the annual income from the investment is used to address immediate needs at <<parish name>>. The remaining funds are reinvested to ensure indefinite financial support.

Charitable Gift Annuities

A charitable gift annuity (CGA) is a great way you can make a gift to our organization and benefit. You transfer your cash or property to us; we promise to make fixed payments to you for life at a rate based on your age and you name <<parish>> to receive the remainder after your lifetime. When you create a charitable gift annuity to benefit <<parish>> you may receive a variety of tax benefits, including a federal income tax charitable deduction when you itemize.

Charitable Remainder Trusts

Gift your highly appreciated assets to a Charitable Remainder Trust, receive payments for life or a term of years, and the remainder can be distributed to the parish as the designated charitable beneficiary at maturity of the trust. As the donor you may be eligible for a partial tax deduction and avoid up front capital gains taxes.

Donor Advised Funds (DAFs)

DAFs are like charitable checking accounts that give you the flexibility to recommend how often and how much money you want to grant to qualified charities like <<parish>>. DAFs can be set up through a community foundation or your financial institution.