



THE CATHOLIC LEGACY SOCIETY

Call the Office of Planned Giving (719) 866-6518
Or visit www.TheCatholicLegacySociety.org



Have you ever wished you could help your church or favorite ministry? But thought you couldn't afford to make a charitable gift?

Perhaps you are concerned that giving may affect your cash flow or your family's financial security.

There is good news!

You can support your church, a Catholic school or other diocesan ministries without impacting yourself or your family. Please contact us to learn more about these types of charitable gifts.

Here are some gifts anyone can afford to make:

Gifts from a Will or Trust	Designating your parish/favorite ministry as a beneficiary in your will or trust is a simple way to commit to our cause, and it will not affect your cash flow during your lifetime. In addition, it's easy to revoke this type of gift if your situation or goals change.
Beneficiary Designations	Naming your parish/favorite ministry as the beneficiary of a retirement plan, financial account, or annuity is another easy way to help our mission. You can continue to benefit from these assets during your lifetime. A beneficiary designation may also be changed at any time.
Life Insurance	If you have an old, unneeded life insurance policy, you can donate it to your parish/favorite ministry and take an immediate tax deduction. You can also name us as a beneficiary of your policy.
Appreciated Securities, Real Property	If you own securities or real estate that you no longer need or wish to sell, a gift of these assets can benefit your parish/favorite ministry without impacting your cash flow. You may also benefit from capital gains tax avoidance by giving rather than selling these assets.
Tangible Personal Property	If you have valuable assets such as artwork, collectibles, jewelry, etc., that you no longer want or need, consider giving these assets to the diocese and benefit from an income tax deduction this year.
Life Estate	If you own your home and wish to remain living there, you can transfer your home (farm or vacation home) to the diocese while retaining the right to use the home during your lifetime. Enjoy the added benefit of an income tax deduction!
Business Interests, Closely Held Stock and Partnerships	Talk to us about ways to make current gifts from your business or to avoid capital gains tax when you are ready to transfer or sell your business.