



# Planned Giving Options

for St. Austin Catholic Parish

TYPE OF GIFT	FORM OF GIFT	BENEFIT TO CHURCH	BENEFIT TO YOU
<b>OUTRIGHT GIFT TO ST. AUSTIN</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Real Estate</li> <li>• Insurance</li> </ul>	<ul style="list-style-type: none"> <li>• Address needs of parish</li> <li>• Perpetual Income for parish if invested in Endowment</li> </ul>	<ul style="list-style-type: none"> <li>• Income tax deduction</li> <li>• No capital gains tax of gift of appreciated asset</li> </ul>
<b>RETIREMENT PLAN/ IRA</b>	<ul style="list-style-type: none"> <li>• Name St. Austin Catholic Parish as death beneficiary.</li> </ul>	<ul style="list-style-type: none"> <li>• Significant gift upon death of donor</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity to make major gift</li> <li>• Estate and income tax savings</li> </ul>
<b>INSURANCE POLICIES</b>	<ul style="list-style-type: none"> <li>• Name St. Austin Catholic Parish as owner and/or beneficiary.</li> </ul>	<ul style="list-style-type: none"> <li>• St. Austin receives full face value of policy upon death of donor or may receive current surrender value prior to donor's death.</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity to make future major gift with a manageable current cost</li> <li>• Income tax deduction for value of policy at time of transfer</li> <li>• Premium payments may be tax deductible</li> </ul>
<b>BEQUEST</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Real Estate</li> <li>• Personal Property</li> <li>• Percentage of Estate</li> <li>• Remainder of Estate</li> </ul>	<ul style="list-style-type: none"> <li>• Address needs of parish</li> <li>• Perpetual Income for parish if invested in Endowment</li> </ul>	<ul style="list-style-type: none"> <li>• Possible estate tax deduction</li> <li>• Opportunity to make perpetual gift if gift is made to endowment</li> </ul>
<b>CHARITABLE GIFT ANNUITIES</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Real Estate</li> </ul>	<ul style="list-style-type: none"> <li>• Upon death of donor funds will address needs of parish</li> <li>• Perpetual Income for parish if invested in Endowment</li> </ul>	<ul style="list-style-type: none"> <li>• Guaranteed income for life</li> <li>• Portion of income is tax free</li> <li>• Income tax deduction</li> <li>• No capital gains tax on gift of appreciated asset</li> <li>• Reduction of estate taxes</li> </ul>
<b>CHARITABLE REMAINDER TRUSTS</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Real Estate</li> </ul>	<ul style="list-style-type: none"> <li>• Upon death of donor funds will address needs of parish</li> <li>• Perpetual Income for parish if invested in Endowment</li> </ul>	<ul style="list-style-type: none"> <li>• Variable or fixed income</li> <li>• Option to defer income</li> <li>• Income tax deduction</li> <li>• Reduction of estate taxes</li> <li>• No capital gains tax on gift of appreciated asset</li> <li>• Reduction of estate taxes</li> </ul>
<b>CHARITABLE LEAD TRUSTS</b>	<ul style="list-style-type: none"> <li>• Cash</li> <li>• Stock/Securities</li> <li>• Real Estate</li> </ul>	<ul style="list-style-type: none"> <li>• Income from trust addresses current needs of parish for the duration of the trust.</li> </ul>	<ul style="list-style-type: none"> <li>• At the end of trust principal returns to donor or heirs</li> <li>• Tax deduction</li> <li>• Principal can be passed on to other with little or no reduction in value</li> </ul>

# Confirmation of Your Legacy Gift for St. Austin

Please let us know about your deferred gift plans.

Bequests, trusts, and other forms of planned gifts serve as the foundation for the growth and sustainability of our parish. If you have named St. Austin as a beneficiary in a will, trust, retirement plan, or some other deferred giving vehicle, we hope that you will share this good news with us.



Thank you for completing this information.  
This record will help us ensure that your wishes are fulfilled.

Name \_\_\_\_\_ Birthdate \_\_\_\_\_

Address \_\_\_\_\_

**Please describe your deferred gift (or attach a copy of documentation, if you prefer):**

- Will     Revocable "Living" Trust     IRA or Other Retirement Account     Donor Advised Fund  
 Charitable Remainder Trust     Life Insurance Policy     Other \_\_\_\_\_

How would you like St. Austin to use your gift? Unrestricted gifts are used by the parish to address its most pressing needs at the time of receipt. You may also direct your gift to support areas of the parish that speak to your own interests (for example, Catholic education, religious education, music ministry, facilities maintenance).

\_\_\_\_\_  
\_\_\_\_\_

If you are comfortable doing so, please provide an estimate of the current value of your deferred gift to St. Austin. This estimate will allow us to ensure that St. Austin will be able to use your gift as you have specified above. All such information will be kept confidential. **Estimate** \_\_\_\_\_

May we include your name(s) in periodic donor rosters and lists of Heritage Society members?

- Yes, you may print my/our name(s) in acknowledgments published by the parish.  
 No, please do not print my/our name(s) in acknowledgments published by the parish.

Signature \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

***This document does not bind you or your estate.*** By signing this form, you are simply acknowledging your current plans to benefit St. Austin in the future and giving us guidance as to your wishes. St. Austin recognizes that gift plans may change over time, and we hope you will consider notifying us of any relevant changes in your plans. We very much appreciate your expression of support for St. Austin and its important mission.