MORE WAYS TO GIVE

BEQUEST
A Bequest is among the simplest ways to make a planned gift. It can be one or two sentences in your Will or Trust. Within the Will or Trust, the gift might be a specific item or amount of money; it might also be contingent upon certain events or a percentage of your estate.

GIFTS THAT PROVIDE INCOME:

CHARITABLE GIFT ANNUITY (CGA)
A Charitable Gift Annuity involves a simple contract between you and the Catholic Community Foundation in which you agree to make a gift to the CCF or to an existing Catholic institution or ministry fund managed by the CCF. The Foundation, in return, agrees to pay you and/or an individual of your choice a fixed amount each year for the rest of your life.

CHARITABLE REMAINDER TRUST (CRT)
Creating a Charitable Remainder Trust provides you or another named individual(s) of your choice income each year for life or a period not to exceed 20 years from the assets you give.

CREATING A CHARITABLE LEAD (CLT)
Creating a Charitable Lead Trust provides the named Catholic agency with financial support for a period of time, with the remaining asset eventually going to family members or other beneficiaries. The financial support provided from such a Trust can be used to fund an endowment for the Catholic agency through the Catholic Community Foundation.

MORE WAYS TO GIVE

DONOR ADVISED FUND
A Donor Advised Fund is an account which you establish in the amount of $25,000 or more. It is managed by the CCF. You can contribute to the account in any amount at any time, receive appropriate tax benefits, and have the power to make recommendations on which Catholic charity or charities you wish to support.

ENDOWMENT FUND
An Endowment Fund is a permanently restricted fund managed by the CCF in perpetuity. Donors establish an endowment in the amount of $10,000 or more on behalf of a Catholic institution or ministry.

SOCIAL RESPONSIBLE INVESTING (SRI)
- All investments managed by the Catholic Community Foundation are guided by the United States Conference of Catholic Bishops’ (USCCB) statement on Social Responsible Investing (SRI).
- Donors are assured their funds are managed in strict accordance with our Catholic faith.
- Funds provide competitive returns while being aligned with Catholic Social Responsible Investing.

The Catholic Community Foundation for the Roman Catholic Church of the Archdiocese of San Antonio
Federal Tax ID Number 20-5817370

“Charity, patience and tenderness are very beautiful gifts. If you have them, you want to share them with others.”
POPE FRANCIS

Learn more about ESTATE PLANNING
Contact Deacon John Benage at john.benage@ccftx.org
Visit www.CCFTX.PLANMYLEGACY.ORG
CATHOLIC COMMUNITY FOUNDATION
111 Barilla Place, Ste. 101 San Antonio, Texas 78209
(210)732-2157 | www.ccftx.org
The Catholic Community Foundation (CCF) encourages every Catholic to remember the Church in their Planned Giving through their Last Will and Testament, designate a beneficiary of your retirement plan and bank accounts, or through other vehicles such as a gift of Life Insurance, Charitable Unitrusts, and Charitable Gift Annuities.

CREATE A LASTING IMPACT - ESTABLISH A PLANNED GIVING GIFT THAT MEETS YOUR GOALS
Whether you would like to put your donation to work today or benefit a Catholic organization or ministry after your lifetime, we can assist you in finding a Charitable Plan that allows you to provide for your family and support the Catholic Community Foundation or any other Catholic ministry of your choice. Remember to consult with an estate planning attorney.

Through gift planning, you can choose a method of giving that protects your family's needs and offers greater tax savings. Here are a few ways you can support the Catholic Community Foundation Endowment Funds of your choice.

A gift in your will. You may find the flexibility of naming the Catholic Community Foundation in your will or living trust appealing because you can change your mind at any time. By leaving a percentage of your estate to the CCF, gifts to family members and other loved ones remain proportional no matter how your estate fluctuates over the years.

Retirement plan assets. Because retirement plan assets (IRA, 401k, 403b, SEP) can be heavily taxed when left to family, it can be tax-savvy to leave these assets to CCF through beneficiary designations. Bank and Brokerage account assets can also be given through a beneficiary designation.

Life insurance. Life insurance is a simple way to make a big impact. You can leave all or a portion of your life insurance policy to the CCF.

Charitable gift annuity. Charitable gift annuities are a strong gift option. Contact us to learn more about this way to give.

The Foundation offers you seven Planned Giving vehicles, however there are many types of Planned Giving instruments available to you and your family depending on your philanthropic and estate goals. Let us assist you in finding the one that best serves your Planned Giving purpose.

To learn more about Estate Planning visit our Catholic Community Foundation website at www.ccftx.planmylegacy.org and contact me at your earliest convenience. I look forward to being of further assistance to you.

STEVE OSWALD CEO/PRESIDENT EMAIL: steve.oswald@ccftx.org

The Cornerstones of our work are Confidence, Competence and Confidentiality

SOME WAYS TO MAKE PLANNED GIFTS
• Beneficiary
• Bequest
• Charitable Gift Annuity (CGA)
• Charitable Remainder Trust (CRT)
• Charitable Lead Trust (CLT)
• Donor Advised Fund
• Endowment Fund

Beneficiary of Your Assets
One of the easiest gifts you can make is to name the Catholic Community Foundation as a beneficiary of one of your assets, such as your retirement plan, life insurance policy, bank or brokerage account.

Simple Steps to follow:
1. Contact the administrator of your retirement plan, insurance policy or bank account for a change-of-beneficiary form or simply download a form from your provider’s website.
2. Decide what percentage of the account you wish to give to the CCF and name us, along with the stated percentage, on the form.
3. Sign and return the form to your plan administrator or insurance company.
4. Tell us about your gift! It would be our honor to thank you for your support.

Key Benefit: Beneficiary designations offer built-in peace of mind. Your current budget isn’t affected because you make the gift after your lifetime, and you can change your mind at any time. No matter the size, your gift makes a meaningful difference at the Catholic Community Foundation.