



## Please Share Our News

This newsletter contains information for pastors, parish administrators, parochial vicars, and parish staff on parish and diocesan development programs. We ask that parishes please share this newsletter with their finance councils, or other lay volunteer leaders.

## 2011 Bishop's Lenten Appeal Emergency Assistance Fund

The success of the BLA has brought Christ's hope and love to more people in need throughout our diocese. The BLA has exceeded its diocesan goal of \$13,000,000, presenting the opportunity to again this year create a special Emergency Assistance Fund for parish critical needs. This special fund provides a direct line of assistance from the diocese to parishes and includes emergency aid for parishioners such as: food, clothing, utilities, rental or mortgage

assistance and Diocesan Catholic school tuition assistance. Initial grants of almost \$200,000 have been made and there is a limit on future disbursements. To request a grant from the 2011 BLA Emergency Assistance Fund, Pastors or Parish Administrators may contact Tiffany Waits at [t.waits@arlingtondiocese.org](mailto:t.waits@arlingtondiocese.org) or 703-841-3848 for the application form.

## Register Today for the ICSC 2011 ANNUAL CONFERENCE, October 23-26, Orlando, Florida

The International Catholic Stewardship Council's annual conference offers the most comprehensive and relevant programs on the theology, spirituality and practical aspects of Christian stewardship.

**Network!** The ICSC annual conference is widely recognized as the most valuable opportunity for those involved in Christian stewardship to connect with others who share their commitment to teaching stewardship as a way of life. Many say meeting others with similar experiences is the main reason they attend the ICSC Conference!

**Learn!** The ICSC annual conference is filled with sessions and forums that provide practical information you can take home and use immediately. You will be exposed not only to topics that offer fundamentals, but also new ideas, innovations and strategies!

**Grow in your Catholic faith!** The ICSC annual conference is a great opportunity to get away from your busy schedule to pray, reflect on your own life of faith, listen to inspiring reflections and participate in invigorating liturgies!

**Register Online** at [www.catholicstewardship.org](http://www.catholicstewardship.org) or call ICSC toll free at 1.800.352.3452

*The Office of Development is offering a \$100 per person incentive for any parish representative who attends the conference this year!*

## Parish Offertory Program

In the past six years, 35 parishes in our diocese have implemented the Bannon Parish Offertory program with assistance from the Office of Development. Through this program, parishes have been able to realize an average increase of 20% the first year and an additional 5-8% increase in subsequent years.

During the recession of 2008/2009, the parishes that conducted an Offertory Program experienced a slight increase or maintained their Offertory giving; while those parishes who did not conduct an Offertory program showed a decrease during that period of time.

**All parishes are encouraged to implement an Offertory Program this fall.**

There is no fee involved, just the cost of letterhead, envelopes and postage for the mailing, which is typically \$2-3 per family. This program is spiritually based, asking parishioners each year to prayerfully reflect on their blessings, and then determine what they are able to give to support the Lord's work in their parish.

If your parish is interested in implementing the Offertory Program for the first time and/or would like information for discussion at an upcoming parish finance council meeting, please contact Jeanne Combos at 703-841-2764 or [j.combos@arlingtondiocese.org](mailto:j.combos@arlingtondiocese.org)

## Parish Offertory Program Results

Based on the financial reports received by the Diocese on 8/24/11, 25 out of 35 parishes that reported an increase in offertory income conducted an offertory program. This fact goes along with studies that have shown the two best ways to increase offertory giving are:

1. Ask people to reflect annually on their offertory giving.
2. Ask people to write down their commitment to offertory for the coming year, and acknowledge their commitment.

## Don't leave your IRA to the IRS: Consider a Gift of Retirement Assets to the Diocese of Arlington

### **Option 1: An Immediate Gift of IRA Assets to the Diocese.**

New legislation now allows individuals, age 70 1/2 and older, to transfer up to \$100,000 from their IRAs to any qualified charitable organization, such as the Diocese of Arlington. While this distribution does not result in an income tax deduction, the transfer is not treated as a taxable distribution to the account owner. Moreover, any transfer fulfills some or all of the IRA required minimum distribution without increasing taxable income.

*NOTE: this provision is only effective until 12/31/2011. For more information and a sample letter for your IRA custodian, please call our Office of Planned Giving at (703) 841-3819.*

### **Option 2: Naming the Diocese of Arlington as the Beneficiary of your Retirement Plan**

Because gifts of retirement plan assets to family members can trigger both income and estate taxes (or "double taxation"), you may wish to name the Diocese as one of the beneficiaries of these accounts (with other assets, such as cash, stock or real property passing to your family members). In this way, the full value of your retirement plan can be used for any program or purpose within the Diocese and your family will not be burdened with excessive taxes. Please contact your plan administrator for more information and the appropriate forms.

IRS CIRCULAR 230 NOTICE: We encourage you to seek legal and tax advice in connection with gift and planning matters, as neither the Catholic Diocese of Arlington, nor any of its employees, can provide any legal or tax advice.

# Save The Dates For the 2012 Bishop's Lenten Appeal

Announcement Weekend - February 4-5, 2012

Commitment (In-Pew) Weekend - February 11-12, 2012

Follow up Weekend - February 18-19, 2012



## More than 300 Parishioners are Leaving a Legacy for their Church!

It is very likely that we may not see the fruits of our planned giving efforts until many years down the road. The seeds we plant today may blossom months, years and even decades later.

The Catholic Heritage Circle now has more than 300 members. Members include those parishioners who have included the diocese, a parish or a parish school in their estate plans.

We also have an additional 400 parishioners who have let us know that they are considering leaving a gift to their parish, parish school or the diocese. Please continue to promote planned giving in your parishes and schools. A small announcement today can lead to your financial security in the future.

To learn more about leaving your Parish or the Diocese in your Will or Trust, Stock and IRA gifts, Charitable Gift Annuities and Estate Gifts visit the Planned Giving website at:

[www.legacy.vg/arlingtondiocese](http://www.legacy.vg/arlingtondiocese)

Many helpful resources are available on the Planned Giving website as well as personal testimonies from some of our donors and information about the Catholic Heritage Circle.

Are you using the planned giving bulletin announcements? Please contact Ryan Flood for assistance at 703-841-3819 or [r.flood@arlingtondiocese.org](mailto:r.flood@arlingtondiocese.org)

## OFFICE OF DEVELOPMENT STAFF

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Please contact our staff with questions relating to any of the above programs.

[WWW.ARLINGTONDIOCESE.ORG](http://WWW.ARLINGTONDIOCESE.ORG)

