



Building a *Legacy* of Faith

Catholic Heritage Circle Members
preserve the Catholic faith for
future generations

Please prayerfully consider creating your own *legacy of faith* by including the Catholic Foundation of Arlington in your estate plans.

A LEGACY OF FAITH

When you include a gift in your Will to your parish, Catholic school, or ministry in the Diocese of Arlington, you help ensure the Catholic faith endures for generations to come. Your gift not only strengthens the mission you care about most, it can also bring personal and financial benefits to you and your family.

Ways to Leave Your Legacy:

- A gift in your Will (percentage or dollar amount)
- Naming the Church as a beneficiary of a retirement or investment account
- A Qualified Charitable Distribution from your IRA (may reduce taxes)
- A charitable gift annuity or donor advised fund
- Establishing or contributing to an endowment in honor of your family

*“Do not neglect to do good
and to share what you
have; God is pleased by
sacrifices of that kind.”*

– Hebrews 13:16



Giving Options to Consider

A legacy gift can take many forms and can help you fulfill your charitable wishes while meeting your personal financial objectives.

Tax benefits for you and your heirs will vary depending on the type of gift and the composition of your estate. Always consult a legal or financial advisor before finalizing plans.

Gift from a Will

The most common way to create a Catholic legacy. A Will can direct cash, specific property, or a percentage of the estate to an endowment to support your parish or another ministry.

Gift of Stock

Giving appreciated securities may allow you to avoid capital gains taxes while receiving a charitable deduction for the full market value.

Gift from an IRA

If you are 70½ or older, you can make a *Qualified Charitable Distribution* directly from your IRA—an easy, tax-smart way to give to the Church. For those over 72, it can satisfy all or part of the Required Minimum Distribution while avoiding the income taxes on those distributions.

Gift of Life Insurance

Name the Catholic Foundation of Arlington, a parish, or school as beneficiary of a policy—or transfer ownership of a paid-up policy.

Gift of Real Estate

A parish or Catholic ministry may be named as beneficiary or co-beneficiary of real estate or other personal property.



A *Legacy* of Giving

Throughout life, we give of ourselves—supporting parishes, schools, and ministries that transform lives. We pass on the faith so it will continue to inspire and guide future generations.

Creating or contributing to an endowment at the Catholic Foundation of Arlington is one of the most enduring ways to make this happen. An endowment invests a gift so that it supports the chosen ministry every year—forever.

Examples of Endowments You Can Support:

- Parish endowment
- Catholic school endowment
- Seminarian education endowment
- Raphael Endowment for Youth
- Gabriel Project Endowment for Respect Life
- Ambassadors of Mary Endowment for Marriage and Family

A legacy will continue to bless the faithful for generations to come.



Start your *Legacy* Today

Preparing an estate is one of the most meaningful ways to provide for loved ones and make a lasting impact on the Catholic community.

For assistance with charitable planning, contact:

Samantha Donohue

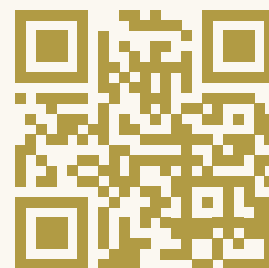
Senior Director of Development

development@arlingtondiocese.org

(703) 778-8600

For more information, visit:

catholicarlington.org



What is the Catholic Heritage Circle?



The Catholic Heritage Circle honors parishioners who have made provisions for the future of the Church in their estate plans. By naming the Catholic Foundation of Arlington, the Diocese of Arlington, or any parish, school, or ministry as a beneficiary, you join this special community of faith-filled supporters.

Members partner closely with Bishop Michael Burbidge in sustaining and strengthening the mission of the Church.

Membership includes:

- An annual Catholic Heritage Circle event with Bishop Burbidge
- Invitations to Catholic Foundation of Arlington gatherings
- Exclusive diocesan news and faith- enrichment resources

To join, speak with a member of the Diocesan Development team, visit catholicarlington.org/chc or email development@arlingtondiocese.org.

ESTATE PLANNING TOOLS TO GUIDE YOUR LEGACY

The Catholic Foundation of Arlington offers free tools to help protect loved ones and plan a Catholic legacy:

- *Catholic Estate and Personal Planning Workbook*
- *Catholic Medical Directives*
- *Funeral and Burial Wishes worksheet*
- Contact information for Catholic attorneys, wealth advisors, and funeral directors



Request free resources at catholicarlington.org or by mailing the form below to:

Catholic Foundation of Arlington
200 N. Glebe Road, Suite 811
Arlington, VA 22203

REQUEST RESOURCES / SHARE YOUR INTENTIONS

Please complete this form and mail it to:

Catholic Foundation of Arlington, 200 N. Glebe Road, Suite 811, Arlington, VA 22203

- Please send a *Catholic Estate and Personal Planning Workbook*
- Please send sample Will/Trust language for leaving a gift to the Church
- Please send a *Catholic Advance Medical Directives* booklet
- Please send information about starting a Donor Advised Fund
- Please send information about starting an endowment
- Please send information about naming a beneficiary of a life insurance policy
- I have already included a gift to the Church in my Will

Name: _____

Date of Birth: _____ Parish: _____

Address: _____ State, Zip: _____

Mobile Phone: (_____) _____ Email: _____