



## SAMPLE GIFT LANGUAGE FOR YOUR WILL OR TRUST

### Gifts to the **General Endowment Fund**:

I give, devise and bequeath to The Foundation for the Catholic Diocese of Arlington, Inc. (Tax ID# 45-3581965), 200 N. Glebe Road, Suite 811, Arlington, Virginia 22203 the amount of ***(insert specific amount, residual, asset, or percentage of estate)*** for the Catholic Foundation Endowment. These funds are to be used for charitable purposes.

### Gifts to a **Specific Endowment Fund**:

I give, devise and bequeath to The Foundation for the Catholic Diocese of Arlington, Inc. (Tax ID# 45-3581965), 200 N. Glebe Road, Suite 811, Arlington, Virginia 22203 the amount of ***(insert specific amount, residual, asset, or percentage of estate)*** for the ***(insert name of Endowment Fund)***.

A list of existing Endowment Funds is attached. If you would like to customize your gift by establishing a new endowment fund, please contact Samantha Donohue, Senior Director of Development at 703-841-3819.

## GIVING THROUGH A BENEFICIARY DESIGNATION

Naming the Catholic Foundation as the sole or partial beneficiary of any of the following:

- Life Insurance Policies
  - Certificates of Deposit
  - Retirement Assets
  - Checking and Savings Accounts
  - Credit Union Accounts
  - Brokerage Accounts
1. Call or go online to your Plan Administrator or Bank to request a “Change of Beneficiary” form.
  2. Provide the name of the Catholic Foundation (and Endowment Fund name, if applicable) along with the Catholic Foundation’s address and tax ID number.

**(Over)**

**Example:** The Foundation for the Catholic Diocese of Arlington, Inc. General Endowment Fund OR  
The Foundation for the Catholic Diocese of Arlington, Inc. for the Saint Joseph of Cupertino Endowment Fund  
Tax ID # 45-3581965  
200 N. Glebe Road, Suite 811, Arlington, Virginia 22203

This information is for general informational purposes only and does not constitute legal or tax advice. We recommend consulting with an attorney or tax advisor.

**Existing Endowment Funds:**

1. Ambassadors of Mary Endowment
2. Mary Jordan Cotter Scholarship Endowment
3. Craig W. and Theresa B. Duehring Endowment
4. Kathleen D. Hannan Scholarship Endowment
5. Deborah and Frank Homburger Family Endowment
6. Maria Grazia Panaro Endowed Scholarship Supporting Students with Intellectual Disabilities
7. Raphael Endowment for Youth Ministry
8. Saint Gabriel Project in Memory of Stephen Joseph Donnelly Endowment
9. Stephen and Constance Donnelly Saint James Parish Endowment
10. Saint James School Endowment in memory of Jane Q. Coleman and Nellie Chekan
11. Saint Joseph of Cupertino Endowment
12. Saint Luke School Endowment
13. Carl H. Sebenius, Jr. and Marie C. Sebenius Endowment
14. Seminarian Education Endowment
15. Joseph A. Tirella Catholic Education Endowment
16. St. Leo the Great Parish Endowment
17. Catholic Charities Endowment
18. Porto Charities Endowment
19. St. Agnes School Endowment