



Inspired Giving

FALL 2023

Your Legacy Matters. Here Are 3 Reasons Why.

It's possible you've heard the notion that "leaving a legacy" is important to Catholic institutions like those supported by the Catholic Community Foundation. But what makes legacy giving so different from writing a check or donating online? Legacy gifts...

1. Focus on the future.

The support parishes, schools and other Catholic ministries receive from annual gifts is critical. But a legacy gift is like a support system the Catholic Community Foundation can count on to help ministries in the Archdiocese for Baltimore for generations to come.

2. Don't affect your current finances.

You can take care of your top priorities—yourself and your loved ones—now while providing for the mission of the Church in the future.

Two of the most popular gift types:

- A gift in your will: A few sentences is all it takes to include the Catholic Community Foundation and the ministries and institutions it supports in your will.
- A beneficiary designation gift: Name the Catholic Community Foundation and the parish, school or ministry you wish to support as a beneficiary of your retirement plan, IRA, donor advised fund or life insurance policy.

3. Help you recognize our role in your life.

If a parish, school or other ministry in the Archdiocese of Baltimore has had a significant impact on your life or the life of someone you love, a legacy gift is a heartfelt way to honor that relationship.

**Let Your
Faith Be
Your Legacy**

When creating or updating your will and other parts of your estate plan, we hope you consider the role your faith has played in your life and how you can continue making a difference far into the future. Contact us at 410-547-5461 or CatholicCommunityFoundation@archbalt.org today to discuss your giving options.



What Is Your ‘Why’?

Make Your Values Last Forever

“Why” is a word that drives us. It does more than ask a question—it defines a connection, a relationship. Why do you love the people we love? Why do certain sights, sounds and smells stir your soul? Why is your faith and your passion to strengthen the Catholic faith so important to you?

The answer always comes with a story. It’s the best part about “why.”

The relationship you have with a parish, school or a Catholic ministry is driven by your unique “why.” There may be a deeply personal reason you care so much about God’s people, a story that compels you to help us actively participate in God’s work in the world.

That story also reinforces your values. Faith, hope and love aren’t important to you by accident. They have a source—an inspiration—and they connect you to the Archdiocese of Baltimore on a personal level: *I value what you value. Your mission is my mission too. I want to see this work carry on for generations.*

This is what makes your relationship with us so special. You share our values and invest in the longevity of our mission. Your “why” and our “why” are the same. Your story and our story are connected.

With a legacy gift through the Catholic Community Foundation, you can carry on our shared values beyond your lifetime. Together, we can secure a future full of hope and share our love of neighbor for generations to come.



Your Values Can Last for Generations

Let your family, friends and future generations know about your unique “why” with a legacy letter. Our FREE guide *7 Questions to Help Build Your Legacy* will give you all the tools you need to get started. Use the enclosed reply card to request your copy today.





Have You Notified Your Beneficiaries?

Don't Forget This Critical Step

What's the best way to ensure that someone knows you love them? You tell them.

How can you ensure that a person or a Catholic ministry knows they meant so much to you that you included them in your estate plan? Same thing: You tell them.

When we hear the term "estate plan," most think of wills. But estate plans also include the proceeds from assets like these, all of which have designated beneficiaries and pass outside of your will:

- 401(k) plans and individual retirement accounts (IRA)
- Life insurance policies
- Bank accounts with payable-on-death (POD) arrangements

Plan administrators have varying policies for notifying the surviving beneficiaries. Be sure your beneficiaries know about your gift so they can manage the process without undue stress. If your loved ones don't know to contact these companies when the time comes, your money may never get distributed to them.

Don't let this happen to your well-thought-out intentions. Provide your beneficiaries with the asset's name, where it's held and the account number. That way, they're prepared to act when the time comes.

Making organizations such as the Catholic Community Foundation a beneficiary of one of the above plans is a great way to preserve your passion for the Church's work. If that's your choice, please let us know with a call or email so we can thank you—and take the necessary steps to ensure we carry out your wishes.



Join Faithful People Like You in the Legacy League

If you have included the Catholic Community Foundation in your estate plan but have not yet notified us, please inform us on the enclosed reply card or call 410-547-5461 so we can welcome you into our Legacy League and ensure your gift is used as intend.

Smart Ways to Give Before 2023 Ends

Would you like to finish this year with a gift that maximizes your impact for the Church and reduces your taxes? Consider these smart options below.

Use Appreciated Securities

By donating appreciated securities that you have owned for longer than one year, you qualify for an income tax deduction and eliminate any tax on the appreciation.

Did you know? If the securities are electronically transferred, the gift date is the day the securities enter our account—not the date you ask your broker to make the transfer.

Contribute to Your Donor Advised Fund (DAF)

Add funds to an existing DAF or open a new one at the Catholic Community Foundation.

Did you know? You qualify for a tax deduction when you make a gift to your DAF. If you are ready to start making an impact with your DAF, consider recommending a grant (or recurring grants) to support one of the more than 500 endowment funds held within the Catholic Community Foundation.

Make a Gift From Your IRA

If you are 70½ or older, you can give any amount up to \$100,000 from your IRA directly to a Catholic ministry through the Foundation. You will not pay income taxes on the transfer. If you are required to take minimum distributions, your gift can satisfy all or part of your obligation.

Did you know? If you have check-writing features on your IRA, your check must clear your account by Dec. 31.



The Countdown Is On

We are always happy to help ensure that you realize the greatest benefit for your kindness. Contact us today to learn more.



CATHOLIC
COMMUNITY FOUNDATION
Archdiocese of Baltimore
Share Your Blessings. Sustain Our Faith.

The Catholic Community Foundation
320 Cathedral St.
Baltimore, MD 21201-4421
410-547-5461

CatholicCommunityFoundation@archbalt.org
ccfmd.org