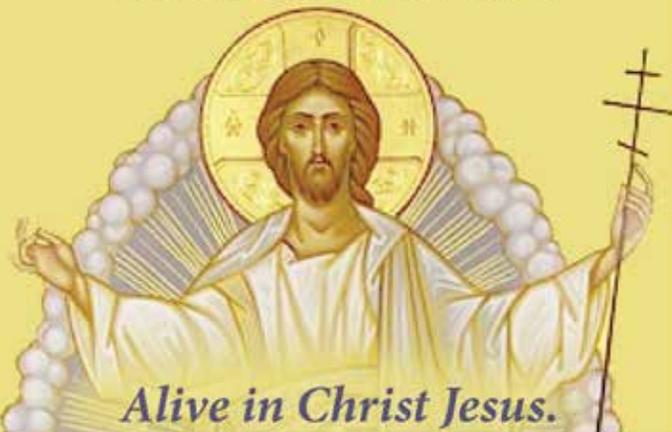


ST. THOMAS AQUINAS LEGACY SOCIETY



CHERISHING THE PAST. LIVING THE PRESENT
AND BUILDING FOR THE FUTURE

ST. THOMAS AQUINAS LEGACY SOCIETY

Sacred Heart Endowment
St. Matthias Endowment
St. Patrick's Endowment
St. Peter's Endowment
Aquin Endowment

LEGACY SOCIETY BENEFITS

- Alleviate financial worries; allowing the pastorate to focus on the true mission of the Church
- Professional management of financial resources
- Budgeting predictable cash flows to supplement weekly envelope revenue
- Provides an opportunity for parishoners to support their parish long term
- Part of the pastorate strategic plan

CONTACT US

For additional information, please contact the pastorate office at 563-852-352 or e-mail Fr. Osterhaus at dbq023@dbqarch.org.

The Catholic Foundation in the Archdiocese of Dubuque

The Catholic Foundation in the Archdiocese of Dubuque (CFAD) works to multiply charitable resources for maximum benefit to our Catholic community. We do this through Catholic charitable planning, investing and grantmaking. We are separate from, yet collaborative with, the Archdiocese and hold endowments for many of the Catholic parishes, schools, cemeteries and other Catholic organizations.

In collaboration, CFAD provides professional investment management and marketing services to the St. Thomas Aquinas Legacy Society.



THE CATHOLIC FOUNDATION IN THE ARCHDIOCESE OF DUBUQUE

www.OurCFAD.org

120 5th St. NW
Cedar Rapids, IA 52405
563-552-0176



PLANNED GIVING



A WIN/WIN PROPOSITION

www.stthomasaquinaspastorate.com

WE ARE INDEBTED

We are indebted to those who have sowed seeds before us. We enjoy liberties we have not won. We worship in churches we have not built and share a faith whose foundation we have not laid.



SEEDS OF THE FUTURE

We hold seeds of the future, for those who succeed us. We make plans to set dreams in motion. The result of our plans will be enjoyed by others we may never meet. God calls us to partner in faith with those who have come before us and to offer the best of what we have to give to those who are to follow in our footsteps.

EXPLAINING GIFT TYPES

Current Gifts: A current gift is a gift that you make today with immediate benefits.

Planned Gifts: The term planned gifts refers to specific strategies that benefit us at some point in the future while offering immediate benefits to you.

"...be rich in good works and generous and ready to share with others. In this way you will build a solid foundation for the future, and win the life which is true life." 1 Tim 6:18-19

WHY SHOULD I GIVE?

Your gift to one of the St. Thomas Aquinas Legacy Society endowment funds will create a *permanent legacy of lasting support* for your parish or school. In addition, an endowment is an excellent way to honor or memorialize an individual or family.

THINGS TO KNOW

When drafting your will, there is a lot that needs to be thought about from your perspective as a parent, grandparent, taxpayer, etc. Another area that requires some attention is your position as a donor to the charitable organizations in your will. Often times we know what a charity's cause is, but we don't know a lot about how they are operated and their capacity to handle planned gifts. Below are a few tips.

Gift Restrictions:

- All planned gifts are appreciated, no matter how they are restricted.
- Not all gifts are easy for a parish or school to fully utilize due to narrow restrictions.
- If you are considering making a restricted gift, please consider putting an alternate use clause in your will.
- Alternate use clauses are useful in cases where a need no longer exists where it once did but funds exist that are restricted to that need.

Gift Options:

Gifts Now: Appreciated securities (or other assets), IRA Rollover, Real Estate or Life Insurance

Gifts That Pay Income: Charitable Gift Annuity, Charitable Remainder Trust or Charitable Lead Trust

Gifts Later: Bequest, Retirement Plan Assets or Bank/Investment Accounts

CONSULT YOUR FINANCIAL PROFESSIONAL

When considering a planned gift to a charity, always consult a financial professional when considering creating a will or making changes to an existing estate plan.