

FOSTERING GENEROSITY



WILLS AND BEQUESTS

Popular Avenues of **GENEROSITY** Used by Catholic Community Foundation Donors

Your Catholic legacy is the mark you leave on the world and an example of God's grace in your life. Donors, just like **you**, give through CCF to sustain our Catholic heritage for future generations.

A **Will** allows you to make choices regarding the distribution of assets you have accumulated during your lifetime. A **Charitable Bequest** in your Will provides the flexibility to use part of these assets for the charities that mean the most to you. You can have it both ways: Ensure the financial well-being of your family and provide for the nonprofits that you love.

How It Works

- **Talk to Your Family:** Tell them that establishing a lifetime of generosity is important to you, and that you would like to build that legacy with CCF to honor your wishes now and in the future. You can even make your bequest in memory or in honor of a family member.
- **Meet with Your Professional Advisors:** Your financial and legal advisors can help structure your gift to your greatest advantage. While we do not provide legal or financial advice directly, CCF can meet with you to discuss your options prior to your meeting.

Catholic Community Foundation
Archdiocese of New Orleans

7887 Walmsley Ave.
New Orleans, LA 70125
504.596.3045 | www.ccfnola.org

Key Benefits

- **Flexibility:** Use the asset during your lifetime for any unforeseen expenses while also achieving long-term philanthropic goals. Bequeath a specific item, amount of money, or percentage of your estate.
- **Tax Savings:** Receive an estate tax charitable deduction for bequests made to qualifying charitable organizations.
- **Simplicity:** Make a lasting gift to your church, school, or ministry by simply adding a few sentences to your will.

Support Your Favorite Charities By Simply Adding These Words to Your Will:

"I hereby give, devise, and bequeath the sum of \$ _____ [or ____ percentage of... or residual of my estate] to the Catholic Community Foundation Archdiocese of New Orleans, or its successor organization, located at 7887 Walmsley Ave., New Orleans, LA 70125, Federal Tax ID #72-0840256, for the benefit of a specific named parish, school, ministry, or other organization."

FREE ESTATE-PLANNING RESOURCE

Want to explore what leaving a Catholic legacy means to you on a spiritual level? Visit ccfnola.org and click the **Lifetime of Generosity Digital Legacy Seminar** button for our 30-minute interactive offering of video teachings and workbook prompts. Included in the seminar is a free will-writing tool courtesy of our relationship with **FreeWill.com**. If you prefer, take 20 minutes to create your Will at freewill.com/ccfnola. (Disclaimer: ccfnola.org/freewillcom)

As always, CCF recommends that you seek the professional advice of your philanthropic advisor, tax advisor, and/or your attorney. If you do not have a relationship with an attorney or tax and estate practitioner, a member of CCF's Professional Advisors Council can help you include your favorite Catholic organizations in your estate plan. This free resource does not address your medical directives in the context of Church teaching. Visit usccb.org and search for **Advance Medical Directives: Planning for Your Future** for guidance.



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