

Leaving a Legacy

**With Catholic Charities
of Jackson, Lenawee
& Hillsdale Counties**



CATHOLICCHARITIESJLHC.ORG



*A legacy gift ensures that
Catholic Charities will be
around years from now to fulfill
the needs of the community.*



Legacy Giving

What is Legacy Giving (Planned Giving)

Legacy giving or planned giving is a philanthropic approach to supporting your favorite nonprofit organization through a transfer of assets as part of an estate plan or bequeathed through a will. These assets include cash assets, real estate, stock, and life insurance to name a few. This forward-thinking approach to giving is “planned” because a donor’s assets are often not liquid, being used to generate income, wrapped up in a business, and/or have current tax limitations or consequences if accessed. Legacy giving provides many tax benefits that can benefit you now or in your future estate. In short, legacy giving is a deferred form of individual giving.

It's Not All or Nothing

Legacy giving can work in tandem with other family priorities; it is not an all-or-nothing bequest. These gifts can co-exist with other beneficiaries and personal priorities. If you prefer, your gift can be based on percentages rather than a lump sum.

Legacy Giving Options

A bequest through your will or trust is one of the most popular and flexible ways that you can support Catholic Charities. A beneficiary designation gift is a noble alternative to a traditional bequest; it’s a simple and affordable way to make a gift to support Catholic Charities. You can designate us as a beneficiary of a retirement plan, investment or bank account, or your life insurance policy.

Beneficiary Designation

- Insurance policy beneficiary
- Retirement plan beneficiary
- Bank account beneficiary

(Anyone considering a planned gift should consult a tax and/or legal advisor to determine the consequences or benefits of making a gift.)

There are, however, other ways a person can give in their legacy and each one has specific significant tax benefits, some present and some future.

Real estate

Stocks

Charitable IRA rollover

Charitable gift annuity

Personal property

Charitable Remainder or a Charitable Lead Trust



Why Catholic Charities?

As a Michigan 501(c)3 nonprofit organization, Catholic Charities can accept donations of a variety of types and amounts. We undergo an independent financial audit each year, insuring our financial stability and integrity. Rest assured that your legacy gift will be appreciated and utilized in a fiscally responsible manner, helping us serve more clients and making a greater impact on our community.

About Our Organization

At Catholic Charities of Jackson, Lenawee and Hillsdale Counties, our goal is to make our counties healthier, more compassionate communities by empowering individuals with the capacity and the desire to improve their quality of life.

Since 1958, we've led the battle against the issues that plague so many in our neighborhoods. We provide an array of human services, regardless of faith or ability to pay, welcoming everyone with open arms and open hearts.

Our Mission

Jesus commanded us to love our neighbor. At Catholic Charities, we carry out that command by **providing help** and **creating hope** for individuals and families who come to us for support.

The mission of Catholic Charities of Jackson, Lenawee and Hillsdale Counties is the work of the Catholic Church, to share the love of Christ by performing the corporal and spiritual works of mercy.

Our goal is to give our clients the skills and confidence to lift themselves out of negative situations and become productive members of our community.

DID YOU KNOW? You do not have to be Catholic to receive services from Catholic Charities. As a Catholic organization, we are here to serve our community, regardless of one's faith or their ability to pay for services. When someone comes to our door for help, we do all we can to provide the help they need, often going beyond our standard service offerings.





Catholic Charities is grateful for the kindness of its devoted benefactors who share in the passion of our mission — that person is YOU! Legacy giving allows for the success of future programs and ensures that the issues you care about — and the values you cherish — will be long remembered.

Designated Contributions

Interested in setting up regular or one-time disbursements from your IRA, 401(k), or other financial account? Talk to your financial advisor, institution, or tax advisor about the tax benefits you could receive through your contribution(s). Simply let them know your wishes and provide them with our agency's legal information:

Legal Name: Catholic Charities of Jackson, Lenawee and Hillsdale Counties

Legal Address: 3425 Francis Street, Jackson, MI 49203

Tax ID/EIN: 38-1818593

They can help you plan your gift to make the biggest impact for you — and for us. For additional information or other ways to give, contact us at development@catholiccharitiesjlhs.org or (517) 879-0599.

Ways to Give

- Direct donation (cash, check, debit or charge card)
- Online at GiveToCatholicCharities.com
- By calling 517.879.0599
- Mailing or drop off at either Jackson or Adrian office
- Monthly or regular donations through automatic withdrawal or payments set up through your credit card or checking account
- A planned gift designated to our agency

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Sample Legacy Giving Verbiage

There are many ways you can bequeath funds to Catholic Charities. You can designate a lump sum, a percentage, residuary designation, or contingency bequest. Below are simple verbiage examples that can be considered for your will, trust, or an amendment to your existing will or trust.

SPECIFIC GIFT

"I give, devise, and bequeath to Catholic Charities of Jackson, Lenawee and Hillsdale Counties, a Michigan 501(C)(3) organization, the sum of _____ dollars (\$_____)."

SPECIFIC PERCENTAGE

"I give, devise, and bequeath to Catholic Charities of Jackson, Lenawee and Hillsdale Counties, a Michigan 501(C)(3) organization, an amount equal to _____ percent (_____%) of the value of my estate at the time of my death."

RESIDUAL BEQUEST

"I give, devise, and bequeath all of the residue of my estate, both real and personal, to Catholic Charities of Jackson, Lenawee and Hillsdale Counties, a Michigan 501(C)(3) organization."

CONTINGENT BEQUEST

"If the above-named beneficiaries should predecease me, then I hereby give and bequeath all of my property and estate to Catholic Charities of Jackson, Lenawee and Hillsdale Counties, a Michigan 501(C)(3) organization."

*Please note that we do not offer legal, financial or tax advice.
Be sure to consult with your financial advisor or estate planner
for more specifics.*



☐ I have included Catholic Charities of Jackson, Lenawee and Hillsdale Counties in my estate planning

☐ I intend to include Catholic Charities in my planned giving

Tell me more about:

- ☐ Developing Charitable Goals
- ☐ Wills, Trusts & Estate Planning
- ☐ Giving to Endowment Funds
- ☐ Creating an Endowment Fund
- ☐ Tax-Advantaged IRA Rollover Gifts
- ☐ Tax-Advantaged Gifts of Stock or Real Estate
- ☐ Donor Advised Funds
- ☐ Other ways to support Catholic Charities

PLEASE CUT THIS CARD OUT AND MAIL BACK TO:

Catholic Charities JLHC

3425 Francis Street, Jackson, MI 49203
ATTN: Development Staff

NAME

ADDRESS

CITY

STATE

ZIP CODE

PHONE

EMAIL

PREFERRED CONTACT METHOD: ☐ PHONE ☐ EMAIL ☐ MAIL



Contact Information

Legacy giving doesn't have to be complicated or impersonal. Please contact us if you have questions, need direction, or just want more information. We share the same passion for the work of Christ, whether it's for our current or future missions.

Please contact us at development@catholiccharitiesjllhc.org or (517) 879-0599.

For Professional Advisors

We welcome the opportunity to assist you as you create your clients' philanthropic objectives into well-crafted estate plans. Please feel free to contact us directly for information or assistance.

Legal Language and Tax ID

For all legal purposes, please refer to our organization as:
Catholic Charities of Jackson, Lenawee and Hillsdale Counties

3425 Francis Street

Jackson, Michigan 49203

517-782-2551

EIN/Tax ID#: 38-1818593



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