



Wednesday January 12, 2022

Beginning a new year is a great time to plan for your future. This year, give yourself the gift of peace and predictability. With so much uncertainty in the world, would you like the comfort of beginning this year (and every year) with a more certain future? We have tools and ideas that will help you bring more reliability and dependability to your year and your life. A more dependable new year gives you:

- Income tax savings
- Capital gains tax savings
- New payment streams for you and your spouse

Each of the following are powerful tools to help you craft a dependable future for yourself:



**CHARITABLE  
REMAINDER UNITRUST**

Transfer appreciated stock to this trust without paying capital gains, then get an income stream and other tax benefits for the rest of your life



**CHARITABLE  
GIFT ANNUITY**

Fund a charitable gift annuity with us and receive favorable fixed rate payments for life. You also receive an income tax deduction this year



**LIFE ESTATE**

Transfer title from your house or other property to charity and continue living there for life, while receiving income tax benefits today

We can help you create a future where you will receive dependable tax benefits. With the right tools, such as a charitable gift annuity, you receive reliable payments in the same amount every year for as long as you live. And you can provide a long-term legacy of giving to your Parish, your

Catholic school or academy, or any ministry in the Diocese of Brooklyn, strengthening the future of the Church here in Brooklyn and Queens.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375](tel:718-965-7375) x1616 or reply to this e-mail. To help ensure your will and estate plan reflects your desires, you may also view some helpful videos on our planned giving website –[www.cfbqlegacy.org](http://www.cfbqlegacy.org).

*This information is educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.*



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## PERSONAL PLANNER

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### [Trusts for Surviving Spouse](#)

There are three different basic types of trusts for a surviving spouse: a qualified terminable interest property trust (QTIP), a qualified domestic trust (QDOT) or a charitable remainder trust (CRT).

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## SAVVY LIVING

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### [Navigating Housing Options](#)

Can you explain the different types of housing options available and recommend some good resources for locating them? I need to find a place for my parent and could use some help.

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## DONOR STORY

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### [Tax-Free Sale](#)

Howard and Lynn were both age 55 when they purchased some vacant land a few miles outside of town. They thought real estate would be a good investment that could be sold later for a profit.

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## WASHINGTON NEWS

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### [Prepare For Filing - Last Estimated Payment](#)

During the first month of 2022, it is an excellent time to think about preparing to file your 2021 income tax return. In IR-2022-3 the Internal Revenue Service (IRS) reminded taxpayers that they may wish to make a fourth quarterly tax payment prior to the...

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## FINANCES

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[Walgreens Reports Earnings](#)

[Treasury Yields Rise](#)

[Mortgage Rates Increase](#)



Thank you for your interest in planned giving. To access any of our resources, please go to our [website](#).

## FREE ESTATE PLANNING GUIDE

It's never too late to plan for the people and causes you care about. Our easy-to-use estate planning guide can help you gather the information you need before meeting with your attorney.

[Download Guide »](#)



## PLANNED GIVING CALCULATORS

Use our online calculator to view the tax and income benefits of making a gift to support our cause. This can help you determine the best plan to meet your needs and goals.

[View Calculators »](#)



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