



Wednesday July 14, 2021

A bequest is a gift made through your will or trust. A bequest is the simplest type of planned gift for you to make and easiest to implement. You may make a direct bequest to any loved one or charity or name a loved one or charity as a residual beneficiary of a percentage of your estate.

BENEFITS OF BEQUEST: You may desire to support a charity, including your Catholic school or academy, your parish, or any mission of the Diocese of Brooklyn, but are unable to make a significant gift during your lifetime. For example, you may have property that is needed during life, or assets you need to cover your living expenses or health care costs. But without a charitable bequest, these same assets may be exposed to significant capital gains or estate taxes. Talk to your attorney and financial advisor about planned giving strategies to avoid significant taxes through a simple bequest in your will or trust.

Please give us a call at 718-965-7375 x1621 or reply to this e-mail with “Estate Planning” as your subject if you have any questions. To help ensure will and estate plan reflects your desires, you may also view some helpful videos on our planned giving website –www.cfbqlegacy.org.

We are so pleased that our Catholic churches are once again open to full capacity. We understand that many will not be able to attend in person, the Diocese of Brooklyn will continue to stream masses so that all may join in the celebration of the Eucharist. Please [click here](#) for a schedule of streaming and broadcast masses. You can [click here](#) to leave your special prayer intention at any time.

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

[Integrity and Initiative](#)

Pat and Allen were talking about their three children. They are empty nesters and the three children are off making their way in the world.

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SAVVY LIVING

[Smartphone Tips for Tech-Shy Users](#)

Can you recommend some good smartphone features for older seniors? I would like to get my 78-year-old mother to upgrade to a smartphone but want something that's easy for her to see and use.

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DONOR STORY

[Capital Gains Tax Bypassed](#)

Peter and Gail were nearing retirement. Over the years, with the help of their financial advisor, they made solid investments in securities and built a sizable portfolio.

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WASHINGTON NEWS

[July IRS Events Promote Advance Child Tax Credit Payments](#)

The IRS hosted events in 12 cities on Friday, July 9 and Saturday, July 10, to help individuals register for the Advance Child Tax Credit (ACTC) payments.

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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.



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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.



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Catholic Foundation for Brooklyn and Queens, 243 Prospect Park West, Brooklyn, NY 11215

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