



*Wednesday, May 11, 2022*

Chances are you own a personal residence or vacation home that has appreciated over time. If you are like many individuals, at some point you will want to sell your property and are looking for a way to increase your income and avoid paying capital gains tax.

Did you know that your home could be the key to your future? A number of plans for your home, permit you to make a gift to charity and receive income and tax benefits. Let's look at ways to plan for your future and also make a gift to the missions of the Diocese by using your home. If you have questions about any of these plans, please call us and we'll help you select the plan that is right for you

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.*



Endowments



How to Give



About Bequests

## PERSONAL PLANNER

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### Zero-Tax Cash and Trust

About 15 years ago Linda's father passed away. As her inheritance, she received a commercial lot that was a mile outside of town. At the time she received the inherited property, it was worth about \$100,000.

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## SAVVY LIVING

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### Specialized Moving Services That Help Seniors Downsize and Relocate

Can you recommend any businesses or services that specialize in helping seniors downsize and relocate? I need to find some help moving my mother from her four-bedroom home to an apartment near me.

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## DONOR STORY

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### Leading for the Future

Luke and Cynthia spent many years volunteering and supporting their favorite charity. They wanted to give back in a way that would help fulfill its mission.

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## WASHINGTON NEWS

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### [Tax Benefits Highlighted for Businesses](#)

On May 3, 2022, the Internal Revenue Service highlighted benefits available during National Small Business Week. The IRS theme for this effort is "Building a Better America Through Entrepreneurship."

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## FINANCES

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### [Chevron Quarterly Report](#)

### [Treasury Yields Increase](#)

### [Mortgage Rates Remain High](#)



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

## FREE ESTATE PLANNING GUIDE

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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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