



Tuesday, October 25, 2022

Easy Like a Fall Morning

Fall mornings are special. A light blanket or jacket is all you need. It is just one of the easiest times of year. Usually, when people think of estate planning, they think of complicated documents and multiple trips to an attorney, but like an autumn morning, some things are easy. The simplicity and joy may surprise you.

When you talk with your attorney, ask about a payable on death designation. A payable on death designation, or POD, is one of the easiest things you can do in your planning. You can use it for your checking, savings, investment and retirement accounts. By completing a simple form for each account, you can choose who receives the account when you pass away. It only takes a few moments to complete.

When you complete a beneficiary designation or POD for your accounts, you have the simplicity of:

- Changing your beneficiaries when you want
- Changing your mind as often as you want
- The comfort of knowing your accounts pass automatically at your death

Work with your attorney to make sure a beneficiary designation fits in your plan. Then ask your banker or account administrator about a beneficiary designation form. You can help the family member or charity of your choice (or both) with a simple, easy designation. You can then live every day wrapped in the comfort of knowing you have made a difference.

For more information and our step-by-step estate planning guide please give us a call at [718-965-7375 x1616](tel:718-965-7375) 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.

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

IRA Charitable Rollover

The IRA charitable rollover was created in 2006 and made permanent by Congress in 2015. This giving plan is available for IRA owners who are over age 70½. It is a direct transfer from an IRA to a public charity.

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[Average Funeral Costs](#)

My spouse and I are interested in prearranging our funerals and would like to have a cost idea to plan and budget appropriately. What are the general costs for funeral arrangements?

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[A Bequest to Save Taxes](#)

Thomas was a widower who had a great love for our organization. As an individual who had directly benefited from our work, Thomas wanted to thank us with a gift from his estate.

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WASHINGTON NEWS

[Increased Standard Deduction May Save Taxes](#)

America has experienced high inflation during 2022. Due to the growing inflation this year, the Internal Revenue Service has announced that there will be a 7% increase in the standard deduction for 2023.

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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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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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