

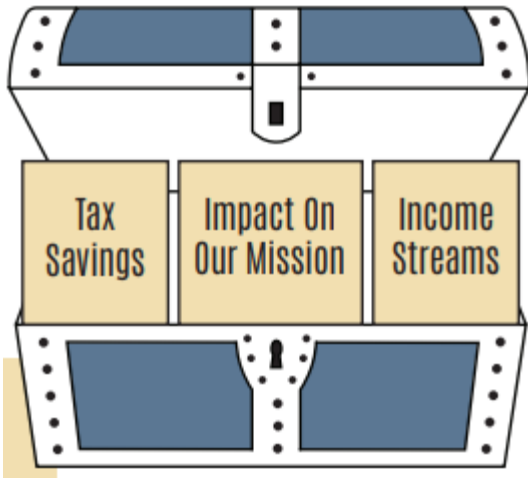


Wednesday, March 22, 2023

Treasure Your Future

There is treasure in your future. Like a chest buried in a sandy island beach, your treasure has significant monetary value and will change your life. However, to claim yours, you do not need a map, boat or shovel. You just need a phone or an internet connection to contact us for directions.

We can help you save significant amounts of taxes. We can also help you create new income streams. Both are real, and both put money in your pocket. Like most treasures, they are known by only a few people. But unlike gold and precious gems, our treasure also helps you help others – so you can feel doubly good about the doubloons you find.



While we have many different types of treasure for you to claim, consider the following to help you get started:

- CHARITABLE GIFT ANNUITY creates payments for you at fixed rates. You also receive income tax and possible capital gains tax benefits.
- LIFE ESTATE gives you an income tax deduction today for a gift tomorrow. You live in your house for life, then it passes to our mission.
- CHARITABLE BEQUEST costs nothing today but allows you to live every day knowing you have helped others and reduced possible estate taxes.

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.

Theme of the Month: Why Planned Giving? Making a planned gift is a win-win for you the donor and your favorite non-profit(s). You have the opportunity to leave significant amounts to your favorite causes and give your heirs a tax break. Planned giving provides more power over how your gift is used by adding requirements for its use while leaving an impactful legacy.

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

Gifts of Stock

What will the market do this year? Perhaps the best answer is, "It will go up and down." Stock returns vary to a significant degree each year. However, long-term stock returns have been reasonably substantial.

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SAVVY LIVING

Medicare Surcharges When Income Changes

I currently have high Medicare premium surcharges due to my past income. My income has dropped since I retired and I can no longer afford the premium surcharges. Is there a way to appeal my



Medicare premium surcharges?

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DONOR STORY

Current Gifts

As is the case with many families, there are times each year when Jim and Sharon focus their attention on gift giving.

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WASHINGTON NEWS

Stress-Free Tax Filing Tips

As the tax season moves into high gear, the Internal Revenue Service (IRS) published a series of tax tips for stress-free filing. The IRS asks taxpayers to keep these tips in mind to make certain that their taxes are done correctly and they receive prompt...

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FINANCES

Adobe Releases Earnings

Treasury Yields Fluctuate

Mortgage Rates Fall



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.



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