



Wednesday, September 14, 2022

Why planned giving? Planned giving is a way for you to integrate your personal, financial and estate planning by making lifetime or testamentary charitable gifts. Below are two types of planned gifts and their benefits. Please note this is part one in a three-part series that covers the most common types of planned gifts and their benefits.

Bequest – 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 the easiest to implement.

Benefits of Bequest - You may desire to support charity but are unable to make gifts during your lifetime. For example, you may have property that is needed during life to cover your living expenses or health care costs.

Charitable Remainder Trust (CRT) - You transfer your cash or property to fund a trust that makes payments for your lifetime or a number of years and then passes what remains to any mission in the Diocese of Brooklyn you choose.

Benefits of CRT - You own appreciated property that produces little or no income and would like to sell without paying capital gains tax. You may be desiring income for retirement.

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.

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

What Do You Own?

John and Helen have been thinking about updating their estate plan. They called and made an appointment with their attorney, Clara.

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What kind of changes can Medicare beneficiaries expect to see from the Inflation Reduction Act that was recently signed into law? How will this reduce out-of-pocket spending for Medicare beneficiaries?

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Keith has been a faithful supporter of and makes regular gifts to support our work.

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When Queen Elizabeth II passed away on September 8, 2022, the "Operation London Bridge" was activated. The Queen was revered throughout the world and was the longest-serving monarch in the history of Great Britain.

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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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