



CATHOLIC  
FOUNDATION  
for Brooklyn and Queens

# GIFT PLANNING



*Wednesday September 15, 2021*

Have you ever wondered what the estate planning process looks like? Here are four basic steps:

1. **Write Down What You Own.** It is important to understand what property you own and what property will be transferred through your estate. You can use this Wills Guide to help you with this process.
2. **Work With an Attorney.** There are many knowledgeable estate planning attorneys. You can bring this completed Wills Guide to them so they can prepare the necessary estate planning documents. Feel free to ask the attorney questions and to talk about your goals.
3. **Know How Property is Transferred.** Some property is transferred by will and some is transferred by a beneficiary designation or other form. You need to know how your property will be transferred in order to avoid an accidental disinheritance. With a good plan, your property may be transferred as you desire. Your attorney can help you with this process.
4. **Sign Your Will and Medical Directives.** Finally, it is important to sign the documents that correctly express your will and desires, both for your property and for your potential future personal care

For more information and our step-by-step guide please give us a call at 718-965-7375 x1616 or reply to this e-mail with "Estate Planning" as your subject. 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).

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

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### [Married Couples and Property](#)

Mary was a surviving spouse. She and her first spouse, Ryan owned a lovely home and placed it into joint tenancy with right of survivorship. After Ryan passed away, Mary met Logan and they were married.

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## SAVVY LIVING

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### [Social Security Program to Help Manage Payments](#)

Does Social Security offer any special help to beneficiaries who struggle managing their benefits? My aunt, who has no children, has dementia and struggles keeping up with her bills and other financial duties.

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## DONOR STORY

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

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## WASHINGTON NEWS

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### [New Plan to Increase Retirement Savings](#)

Congress is working on major legislation that could result in a \$3.5 trillion spending bill. Many House Committees are tasked to write different parts of the massive legislation. As part of that process, on September 10, 2021, the House Ways and Means...

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## FINANCES

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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.



[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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