



Wednesday, September 21, 2022

Last week we went over Bequests and Charitable Remainder Trusts, two common types of planned gifts. This week we have some helpful information on two more. Please note this is part two in a three-part series that covers the most common types of planned gifts and their benefits.

Life Estate Reserved - You transfer your personal residence or farm to us and retain the right to use the property for your lifetime.

Benefits of Life Estate - You want to remain living in your home and desire a current income tax deduction.

Charitable Gift Annuity (CGA) - You make a gift of cash or property to us and we agree to make fixed payments for one or two lives.

Benefits of CGA - You want to make a gift to our organization and receive fixed income for the future. This plan works well with your gift of cash or appreciated stock that is providing little or no income.

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

Separate & Joint Property

"My brother Pete and I own a ranch together," said Joe to his advisor. "We inherited the four sections of our ranch from my mother. As a single person, I think that I will plan to leave 50% of my share to Pete and the other half to my favorite charity."

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SAVVY LIVING

How to Find Travel Companions for Older Travelers

I am interested in finding some type of travel companion service to help my elderly parents fly across the country. They are both in their 80s and have health issues, so they will need help getting there. Do you have any tips that can help us?

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DONOR STORY

[Transferable on Death \(TOD\) Gifts](#)

Harold and Jeanne married after meeting at an event held for our donors. They wanted to leave a legacy gift...

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WASHINGTON NEWS

[Treasury Secretary Promises Improved IRS](#)

On September 15, 2022, Treasury Secretary Janet Yellen spoke to IRS staff in New Carrollton, Maryland. She highlighted IRS improvements that will result from the Inflation Reduction Act.

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FINANCES

[The Kroger Co. Reports Earnings](#)

[Treasury Yields Increase](#)

[Mortgage Rates Increase](#)



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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Catholic Foundation for Brooklyn and Queens, 243 Prospect Park West, Brooklyn, NY 11215

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