



Wednesday July 7, 2021

In June we provided some basic advice on how to organize and prepare to create your legacy. In the next four weeks we will explain the tools you should discuss with your attorney and financial advisor to protect all that you love.

Planned giving is a way for you to integrate your personal, financial and estate planning by making lifetime or testamentary personal and charitable gifts. Strategic use of charitable gifts may save considerable taxes for your loved ones and help sustain the charities you supported in your lifetime, including your Catholic school or Academy, your parish, or any mission of the Diocese of Brooklyn. In the upcoming weeks we will explain some common types of planned gifts and their benefits.

Please give us a call at 718-965-7375 x1621 or reply to this e-mail with “Estate Planning” as your subject if you have any questions. To help ensure will and estate plan reflects your desires, you may also view some helpful videos on our planned giving website –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

[Helping Children Tomorrow](#)

Parents and children often have a different perspective on saving and spending. Parents of retirement age today were born during the 1940s or 1950s and have a strong desire to save and invest in order to increase economic security.

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SAVVY LIVING

[How to Pick the Best Place to Retire](#)

My husband and I will both be retiring in a few years and are interested in relocating to a warmer climate but could use some help. What resources can you recommend for locating and researching good places to retire in the U.S.?

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DONOR STORY

[Tax-Free Sale](#)

Howard and Lynn were both age 55 when they purchased some vacant land a few miles outside of town. They thought real estate would be a good investment that could be sold later for a profit.

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WASHINGTON NEWS

[Leave Donations Extended for 2021](#)

While the COVID-19 pandemic is slowly subsiding, there are still new cases every week. Many charitable organizations continue to provide relief services to COVID-19 patients and their families. In 2020, the IRS authorized a program to encourage gifts to...

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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.



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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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