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We hope you and/or your loved ones consider an IRA Charitable Rollover to support the important work of the Archdiocese of Indianapolis and its parishes, schools and ministry agencies. You and your advisors are encouraged to call 800-382-9836, ext. 1427 with questions and for rollover delivery instructions. You also are invited to visit www.archindy.org/plannedgiving for more information.

Priorities When Planning Your Legacy

Through careful planning, you can shape your legacy. The options we’ve covered are simple ways to make an important difference for loved ones and the charitable organizations you care about, and they also provide you with flexibility to make changes whenever you feel it is necessary. As you make plans to create your personal legacy, please let us know if we can help you and your advisors explore ways to include a gift to the Archdiocese of Indianapolis.

For additional information about the Catholic Community Foundation, Inc., please contact:

Ellen M. Brunner, Director of Planned Giving
Office of Stewardship and Development
Archdiocese of Indianapolis • 1400 N. Meridian Street, Indianapolis, IN 46202-2367
317-256-1427 • 800-382-9836, ext 1427 • ebrunner@archindy.org • www.archindy.org/plannedgiving

Please remember the Church in your estate plan.

Anyone Can Leave a Legacy

Wilma Rudolph was a childhood polio victim. Some believed she would never walk without the aid of a leg brace. But in 1960, she captivated the world by winning three Olympic gold medals in track and field—a feat never before accomplished by an American woman. In 1969, the world fixed its attention on the moon when Neil Armstrong became the first man to walk on the lunar surface. These legacies of courage and resolve continue to inspire us today.

You don’t have to be Wilma Rudolph or Neil Armstrong to leave a lasting legacy. Your loved ones and the charitable organizations you support can be influenced forever by your personal priorities, vision and commitment. This issue of Preserving Our Faith — Creating A Legacy explores what leaving a personal legacy means, along with the steps you can take now to benefit others and accomplish philanthropic goals.

If we can answer any questions or help you explore these ideas in greater depth, feel free to contact us at 317-236-1427, 800-382-9836, ext. 1427, ebrunner@archindy.org or by returning the enclosed card. Be sure to request our complimentary brochure, Your Personal Legacy—What It Means and Why It Matters. It is designed to help you and your advisors explore planning options for creating a personal legacy.

Your planned gift will educate and train new priests so they can provide the life-giving wonders of the sacraments, prayer and spiritual direction.

In This ISSUE

• You Can Leave a Legacy
• Strong Results, Simple Solutions
• The Legacy Society

Charities will provide help for the people we serve.
You Can Leave a Legacy

There is a tendency to associate legacy with great wealth. Yet everyone leaves a legacy—anything from tangible property to life lessons, challenges or accomplishments that inspires others.

Have you thought about what your legacy might be for your loved ones and the charitable organizations that are important to you? Your legacy might include a gift of property that can make a tremendous difference in the lives of people. It may be volunteer work, the time you spend with family and friends, or accomplishments that those who care about you can remember with pride.

Provisions for Loved Ones

One portion of your legacy is certain—the provisions you make for the people you care about, including children, your spouse, a favorite nephew and/or a caregiver. Your will or living trust assures careful distribution of your property. It also provides you with an opportunity to direct special and meaningful gifts. Every situation is distinct. Your goals may include:

• providing for your loved ones
• ensuring that property will be properly managed and distributed
• passing treasured heirlooms to family or friends.

Whatever your planning priorities are, when you take steps to provide for the people you cherish, you create a legacy of caring.

Charitable Giving in Support of the Church

Personal philanthropy is rewarding. It makes a lasting difference and inspires others to support the work of the Church. Your personal philanthropy allows us to continue to provide the ministries you care about. It speaks to the mind and heart. Your support for our work:

• fosters Catholic education and lifelong faith formation
• provides education for our seminarians and deacons and retirement benefits for our priests

• offers help to people who are most in need through Catholic Charities.

If you do not have a will or living trust, please consult an attorney or contact Ellen Brunner at 317-242-1427 or 800-92-9836, ext. 1427 for planned gift guidance. It is the best way to document your specific wishes and be certain that they are carried out.

The Legacy Society

Planned giving offers unique opportunities to preserve our faith and create a legacy for future generations of Catholics. The Legacy Society recognizes individuals who make sacrificial commitments to the Archdiocese of Indianapolis, a parish, school or archdiocesan ministry through a will, trust, life insurance, charitable gift annuity or other planned gift. There is no minimum gift requirement.

The Legacy Society was created to acknowledge the critical role our donors play in supporting our mission and making our work possible.

Members of the Legacy Society:

• Have the satisfaction of knowing that they help parishes, schools and ministries be communities of faith and vibrant sources of service.
• Are invited to an annual appreciation Mass and reception hosted by the archbishop.
• Receive periodic newsletters from the archbishop.

Legacy Society membership is rewarding, and we welcome your participation! To learn more about how your gift can qualify you for membership, please contact Ellen Brunner.

Strong Results, Simple Solutions

Although shaping a legacy provides a significant and highly meaningful opportunity to affect future generations, it does not need to be complex. There are simple ways to provide for loved ones and charitable organizations. Many options are inherently flexible, which means you can make timely adjustments whenever your needs or goals change.

A Will or Living Trust

A proven and time-tested option for shaping your legacy is through your will or living trust. This is the best way to ensure that your property is distributed according to your specific wishes.

If you pass away without a will or living trust, the court will appoint someone to distribute your property, essentially granting a stranger the right to determine your legacy. A will or living trust assures that you are the legal executor, thus having control over the distribution and other aspects of your legacy.

Possibilities and Percentages

When you die, your designated beneficiary will receive the policy death benefit or the funds in the qualified retirement account. Your first consideration is providing for loved ones. However, you also can choose to designate the Archdiocese of Indianapolis as either a primary or contingent beneficiary. A contingent beneficiary receives the funds only if the primary beneficiary cannot.

Sample Gift: Your planned gift will provide a values-based, faith-filled learning environment for our students. It is the best way to ensure that your legacy will provide for future generations of Catholic leaders.

Beneficiary Designations

You may be surprised to find that something as simple as a beneficiary designation also can shape your legacy. Careful consideration of beneficiary designations can help you make wise use of assets often overlooked in legacy planning—life insurance policies and retirement accounts.

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In some cases, there are disadvantages to leaving retirement assets to family members. Therefore, some legacy plans provide for loved ones through the estate assets and leave retirement assets to the Church. Feel free to contact us for more information about the pros and cons of gifting certain assets as well as the many available options.

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With any of the options we’ve discussed, you can designate that the Archdiocese of Indianapolis, a parish, school or ministry agency
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