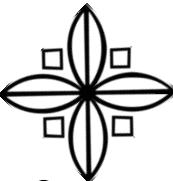


# Building Your Legacy



The Gift Planning Newsletter of the Advancement Foundation Supporting the Diocese of Fort Worth

Spring/Summer 2018



## To the new *Building Your Legacy* newsletter

The **Advancement Foundation** is thrilled to unveil our new **Building Your Legacy** newsletter! **Building Your Legacy** focuses on planned giving and will be published twice each year. The newsletter will be a source of information about changes in laws and regulations as they relate to planned giving, the importance of having a will and other timely topics.

Everyone is building a legacy. That's why we want you to share this newsletter with friends and family. **Building Your Legacy** is a great conversation starter, especially for those who might hesitate to bring up the subject of end-of-life plans. Use this newsletter as your ice-breaker!

Or maybe you know someone who's been thinking about making a planned gift but they aren't sure where to start. Show them **Building Your Legacy** and introduce them to the idea of making a planned gift to their parish, Catholic school or the Diocese of Fort Worth.

Building and planning for your legacy is a way to make a gift today that impacts the future. We hope you will find **Building Your Legacy** helpful as you plan for your legacy.



## Unexpected gift makes a lasting impact

Quietly generous. This might be the best way to describe Robert Downtain. Robert lived in Bedford and was a professor of history at Tarrant County College. He was also a faithful Catholic who planned his legacy to reflect his life's pursuits and passions.



**Mr. Robert Downtain**  
1939-2018

After his passing in January, St. John the Apostle learned of an unexpected gift from the Downtain Estate. This gift is a continuation of Robert's faith and will serve others just as Robert did as friend and teacher.

With Robert's legacy gift, St. John the Apostle has established an endowment fund for its Catholic school.

The purpose of the endowment is to build financial security to serve the greatest possible number of families. Father McKone states, "The wonderful gift that Bob Downtain left to St. John is sparking a belief that 'financially sound' is not our ultimate goal." He added, "This gift leads us to believe that at St. John we can reach a position that will allow us to let our Bishop know that, while we are deeply grateful for funds received through the Annual Diocesan Appeal, we are able to operate without those funds that are so desperately needed in other areas. We have a long way to go, but Bob's generosity causes us to be certain that such a goal is achievable."

Robert's quiet generosity and lasting legacy will have a positive effect on St. John and those they serve, for years to come. Legacy gifts, like Robert's, help parishes and ministries continue their efforts today and ensure their security for the future.

**In This Issue:** ♦ Estate planning to-do list

♦ A guide to charitable giving ♦ Donor Appreciation Luncheon



## Guide to charitable giving

### A family first approach



## Breaking news!

### Charitable Gift Annuity rates on the rise

Exciting news! Effective July 1, 2018, charitable gift annuity rates will increase.

A charitable gift annuity is a donation of cash, marketable securities or other assets that you donate, and in turn, you are paid a fixed amount for life. This type of gift gives you reliable income for as long as you live. And now, if you make your gift on or after July 1, the gift annuity rates will be higher. In other words, your gift will provide you with a higher amount of income.

In addition to the opportunity to increase your retirement income as you help shape our future, gift annuities offer you numerous tax benefits, including:

- A partial income tax charitable deduction now for your gift when you itemize.
- Part of each payment is income tax-free throughout your estimated life expectancy.
- Capital gains tax savings on appreciated property you donate.

Your gift today benefits not only our future, but yours as well.

Contact **Paula Parrish** or **Renée Underwood** to discuss how a charitable gift annuity allows you to make a gift and provides you with secure, tax-favored payments for life. With your gift, we can continue to make an impact in our Diocese.

In addition to passing assets to loved ones, your will can also be used to define your legacy through support of your parish, Catholic school or the Diocese of Fort Worth through **The Advancement Foundation**. When you make a deferred gift in your estate plans, you join the **Legacy Society**. This is a special group of people who have made some of our most important Diocesan advances possible.

#### Advantages

- **Simplicity.** As little as one sentence in your will or is all that is needed to complete your gift.
- **Flexibility.** Until your will goes into effect, you are free to alter your plans.
- **Versatility.** You can give a specific item, an amount of money, a gift contingent upon certain events or a percentage of your estate.

#### How a Gift in Your Will Works

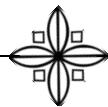
Your estate planning attorney can help you structure a gift so your loved ones will be taken care of first after you're gone.



#### A Gift in Your Estate Plan Is Right for You If:

- You want the opportunity to guide decisions about the future ownership of your possessions and the legacy you leave behind.
- You have a will or are ready to create one.
- You want to make sure your support of your parish, Catholic school or the Diocese of Fort Worth continues after your lifetime.
- You want to balance your generosity to the Diocese with an assurance that loved ones are taken care of first.
- You want to maintain the flexibility to change your mind about your gift at any time.

The information in this publication is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor.



## Keep those vital documents safe Tips for summertime travel

As the weather warms up our thoughts turn to summer vacation plans. We spend hours deciding where to go, how to get there and what we're going to do, but how much time do we spend thinking about document safety? In all honesty, it's probably not at the top of our list! If you're planning to travel this summer here are some quick tips to keep those travel and other important documents safe.

### Use Plastic Bags

Accidents happen no matter your mode of transportation. Beverages are spilled, food is dropped or a pen explodes in your bag. Use quart or gallon size zip top plastic bags to keep your documents protected.

### Make Copies

Before leaving on any trip, make copies of both sides of all bank and credit cards, passports, visas and identification cards. Scan the copies and email them to yourself so that you can access them from anywhere. Or, keep a set of copies with you while traveling. Keeping copies will save you time and worry should you have to replace vital travel documents while vacationing.

### Inform a Friend

Be sure to share your travel plans with a trusted friend or family member. Check-in with them at regular intervals during your time away. Consider leaving copies of your vital travel documents and prescription medicines with them. In case of an emergency, your contact at home will have an easier time assisting you if they are prepared with your travel information.



*The Reverend John "Jack" McKone will be our featured speaker during our Donor Appreciation Luncheon.*

## Donor Appreciation Luncheon draws near

Celebrating generosity is a highlight for the ***Advancement Foundation***. Generosity abounds. That's why we're expanding our ***Legacy Society Appreciation Luncheon*** into a ***Donor Appreciation*** event. This event is for donors who give \$1,000 or more to the ***Annual Diocesan Appeal*** or who are members of our ***Legacy Society***.

Donations of all types make a difference in the work of the Diocese. No matter how you make your gift, a bequest in your will, a one-time donation or a giving society level gift, we want to celebrate your contribution to the continuation of faith in our Diocese.

Please make plans to attend our ***Donor Appreciation Luncheon***:

**Thursday, May 10, 2018**

**11:30 a.m. Check-in**

**Noon Luncheon**

**Historic Hilton Hotel**

**Complimentary Valet Parking**

**By Invitation Only**

Our celebration begins with a delicious, seasonally-inspired meal created just for this occasion. The program will begin after lunch with remarks by our keynote speaker, ***The Reverend John "Jack" McKone***, Pastor of St. John the Apostle Catholic Church in North Richland Hills. ***Father McKone*** will share an inspirational story about the impact that gifts have for today and for the future.

For more information about this luncheon please contact ***Elizabeth Becker*** at 817.945.9443 [ebecker@advancementfoundation.org](mailto:ebecker@advancementfoundation.org)

*It's our privilege to honor our donors at this luncheon. In order to be good stewards of our gifts, and not incur unnecessary expenses, we kindly ask that if you received an invitation you*

*RSVP no later than Friday, May 4, 2018.*



## Upcoming events

**Thursday, May 10, 2018 – Annual Donor Appreciation Luncheon**

Historic Hilton Hotel, Downtown Fort Worth  
11:30 a.m. Check-in  
Noon Luncheon  
RSVP Required

**Thursday, May 17, 2018 – Building Your Legacy Presentation**

St. Andrew Catholic Church, Fort Worth  
8:00 a.m. Mass  
8:45 a.m. Breakfast and Presentation  
RSVP Required

**Saturday, May 19, 2018 – Presbyteral Ordination**

St. Patrick Cathedral, Fort Worth  
10:00 a.m.  
Reception following in Parish Hall

**Thursday, Aug. 9, 2018 – Building Your Legacy Presentation**

Our Lady Queen of Peace, Wichita Falls  
6:00 p.m. Dinner and Presentation  
RSVP Required

**Thursday, Oct. 18, 2018 – Building Your Legacy Presentation**

St. Joseph Catholic Church, Arlington  
8:30 a.m. Mass  
9:15 a.m. Breakfast and Presentation  
RSVP Required



## A gift in your will Today's gifts serving tomorrow

To include a gift to the Catholic Diocese of Fort Worth in your will, simply take the following language to your estate planning attorney:

*I, (name), of (city, state, zip) give, devise and bequeath to the Catholic Diocese of Fort Worth Advancement Foundation, the sum of \$ \_\_\_\_\_ or \_\_\_\_\_ % of the residue of my estate for the benefit of (insert the name of a parish, Catholic school, the Diocese, seminarian education, clergy, Catholic Charities or any other ministry you wish to support in the Diocese of Fort Worth).*



ADVANCEMENT  
FOUNDATION  
*Supporting the Catholic  
Diocese of Fort Worth*

800 West Loop 820 South  
Fort Worth, Texas 76108-2919

**Paula K. Parrish**, CFRE, Executive Director  
817.945.9440

[pparrish@advancementfoundation.org](mailto:pparrish@advancementfoundation.org)

**Renée M. Underwood**, Associate Director  
817.945.9441

[runderwood@advancementfoundation.org](mailto:runderwood@advancementfoundation.org)

[advancementfoundation.planmygift.org](http://advancementfoundation.planmygift.org)



## Questions?

Every gift begins with an important question: How can I make a difference? The **Advancement Foundation** is available to assist you in answering this question.

Maybe you would like to attend one of our **Building Your Legacy** presentations but you need more information. Perhaps you are interested in hosting a planned giving presentation for your parish but you're not sure how to get started. For information on these questions and others you may have about planned giving, contact **Renée M. Underwood**.