

IT IS IN GIVING THAT WE RECEIVE

–Francis of Assisi



**Leave a Legacy of Hope
in Your Estate Plan**



**Catholic
Charities**

Providing Help, Creating Hope

YOUR WILL IS THE MOST IMPORTANT LOVE LETTER YOU CAN WRITE.

Inspired by the transformative power of God's love, Catholic Charities of Oregon — the social service arm of the Catholic Church in western Oregon — partners with the most vulnerable, regardless of faith, to achieve lasting solutions to poverty and injustice. We invite you to partner with us by making a planned gift. A planned gift is a powerful way to express your commitment to creating a society in which all people thrive economically, socially, and spiritually.

YOUR LEGACY HAS A LASTING IMPACT.

Through your will, trust, life insurance, or retirement plan, you can touch the lives of 20,000 Oregonians each year. By including Catholic Charities of Oregon as a percentage or specific dollar beneficiary in your estate plan, you are helping build a permanent endowment for the people we serve.

Your gift provides:

- » Affordable and supportive housing
- » Homeless and support services
- » Migration and Refugee Services
- » Family support services

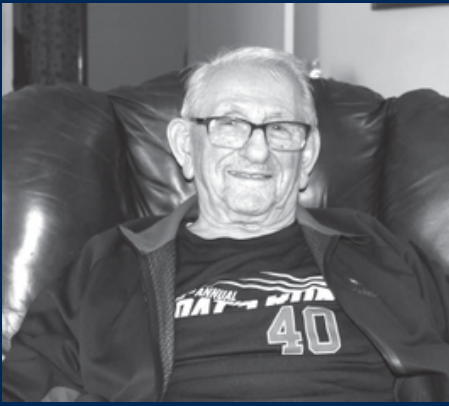
CHOOSE THE OPTION THAT'S RIGHT FOR YOU

Some planned gifts have an impact now, some after your lifetime. Many offer tax savings, and some even provide you with income for life. This brochure contains a few options to consider. Please also consult your tax advisor or attorney, or reach out to one of our staff members for more information.

**It's important to review estate plans occasionally,
especially if:**

- » Your family makeup or relationships change
- » Your financial circumstances change
- » Your loved ones have different needs
- » You have already given some assets away
- » Your charitable interests change
- » Tax law changes could impact your estate





TO GIVE IS TO LIVE

“ To be able to help other people ... I'm thankful for the life God has given me and the blessings I've had, and I feel it's the right thing to do to share that good fortune with many people. ”

—LEONARD LECLAIRE,
CATHOLIC CHARITIES OF OREGON

LEAVE A MEANINGFUL LEGACY

BENEFICIARY DESIGNATIONS

Including Catholic Charities of Oregon as a full or partial beneficiary of your IRA, 401(K), annuity, or life insurance policy continues your commitment to our mission beyond your lifetime. These gifts further the good your giving can provide well into the future. Your plan administrator can provide a beneficiary designation form.

CHARITABLE BEQUESTS

When you name Catholic Charities of Oregon in your will or trust, you provide a charitable bequest of personal property, such as money, stock, bonds, real estate, art, or jewelry. Charitable bequests reduce the estate taxes that might be owed on the estate left by a decedent, while ensuring your passion for furthering the fulfillment of God's vision through your giving continues.

ANNUITIES AND TRUSTS

When you create a charitable annuity or trust benefiting Catholic Charities of Oregon, you assure personal financial goals now, while providing a transformational gift to benefit others in the future.

- + **A charitable gift annuity** can provide you and/or another beneficiary with stable income for life. You may also receive an immediate income tax deduction.
- + Especially designed for younger donors, **deferred gift annuities** make fixed annual payments to you and/or a beneficiary for life, with payments commencing at a future date.
- + **A charitable remainder unitrust**, allows you to receive income for life or for a fixed number of years. You receive an immediate income tax deduction for a portion of your contribution and may save on capital gains taxes if you donate an appreciated asset.

IRA-QUALIFIED CHARITABLE DISTRIBUTIONS

If you are 70½ or older, you may give up to \$100,000 per year directly from your traditional or Roth IRA to 501(c)(3) charities. The transfer generates neither taxable income nor a tax deduction, so you still benefit even if you do not itemize deductions. It can satisfy all or part of your required minimum distribution. Married couples may each give up to \$100,000 from their own IRA accounts.

APPRECIATED SECURITIES

A gift of publicly traded stocks, bonds and mutual fund shares may help you avoid capital gains tax, diversify your portfolio, and/or secure a stream of income. It's a simple and efficient way to give.

CONTACT US ABOUT YOUR LEGACY GIFT

Please Contact Laura Foley, donor relations manager 503.688.2560 or lfoley@ccoregon.org

Catholic Charities of Oregon
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(503) 231-4866
CatholicCharitiesOregon.org

To leave a legacy to support the future work of Catholic Charities, please specify that your gift be made to Catholic Charities of Oregon of the Archdiocese of Portland in Oregon.
Our tax ID is 93-0386801.



“ What we do for ourselves dies with us. What we do for others and the world remains and is immortal. ”

—ALBERT PINE