

# Everyone benefits from gifts *ANYONE* can make.

## A tribute gift through your will or trust

Everyone should have a will, but more than 50 percent of Americans pass away without one. If this happens to you, the laws of your state will determine how your assets are distributed. But you've worked hard for your assets, and you deserve the right to direct what happens to them. A simple gift made through your will or living trust (called a bequest) costs you nothing during your lifetime, and you can update or change it anytime. If you already have a will or trust, you can amend it with a simple one-page document to give a dollar amount or percentage of your estate to the Diocese of Bridgeport or your parish.

## Make the Diocese part of your family

If you've ever opened a bank account, set up a retirement plan or purchased an insurance policy, chances are you completed a beneficiary designation form to say who will inherit those accounts. What many people don't realize is that you can also designate a charity as a beneficiary. It's a very simple form and an easy way to be extraordinarily generous to the Diocese.



## Avoid paying taxes

Did you know that when you designate retirement plan assets to your heirs, taxes can slice away as much as 60 percent before your loved ones see a penny? But when you name the Diocese of Bridgeport or your parish as a beneficiary of your retirement plan, the assets are removed from your taxable estate and are transferred to us—tax-free!

## Buy low, give high

Do you own stocks, bonds or other appreciated securities? You can donate them to the Diocese of Bridgeport or your parish and claim a charitable tax deduction on the full fair market value at the time of transfer. You pay no capital gains on the increased value. That's two great tax benefits with one gift.

## Turn life insurance into a lasting gift

Did you know you can name the Diocese of Bridgeport or your parish as beneficiary or owner of a life insurance policy? It's a creative way to create a substantial gift at modest out-of-pocket cost to you. Life insurance policies are particularly good planned giving instruments for younger donors, or for donors with paid-up cash value policies that are no longer needed. A simple form from your insurance provider is all that's needed to create this powerful legacy gift.

## St. Augustine Legacy Society

*Members of the St. Augustine Legacy Society have expressed their commitment to the Diocese of Bridgeport through a very special and important form of financial support.*

*These donors have named the Diocese of Bridgeport as the beneficiary of a planned gift and are invited to a special Mass and reception with Bishop Frank Caggiano.*



## What is legacy planning?

Legacy planning encompasses a variety of philanthropic strategies designed to help provide for charity while advancing your financial and personal needs. Legacy gifts are gaining popularity because they offer significant tax benefits. You benefit and your parish or the diocese benefits. It's a win-win!

## WANT TO LEARN MORE?

Explore creative giving opportunities at [www.bridgeportdiocese.plannedgiving.org](http://www.bridgeportdiocese.plannedgiving.org).

Or, better yet, give us a call at 203.416.1479.

We would welcome the opportunity to help you plan your perfect legacy gift.

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*St. Augustine*  
Legacy Society

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Diocese Of Bridgeport





# Your Legacy.



You love Christ. And you love your parish. You believe in caring for the needy and supporting excellent programs. You want to see future generations carry on the Catholic faith.

You are Catholic. *This is your legacy.*



## Easy ways to be *GENEROUS*

You can provide strategic support to the Diocese of Bridgeport or your parish that will endure for generations to come. Planned gifts make it possible to be extraordinarily generous.

These kinds of gifts are easier to arrange than most people realize. Many of them not only benefit the Diocese and your parish, but also return benefits to you and your family.

- **GIVE** a gift that costs you nothing during your lifetime.
- **CONVERT** life insurance you no longer need into a high-impact gift.
- **SAVE** on taxes by giving appreciated stock, bonds or mutual fund shares.
- **PRESERVE** your estate for your children and grandchildren, and at the same time deliver years of income to the Diocese.

See the other side of this pamphlet for more details about some of the most popular types of gift plans that make it possible for you to make the Diocese of Bridgeport or your parish part of your lasting legacy.



### *Interested?*

Explore creative giving opportunities and discover your perfect legacy gift at

[www.bridgeportdiocese.plannedgiving.org](http://www.bridgeportdiocese.plannedgiving.org)

Contact: Pamela S. Rittman  
phone: 203.416.1479  
email: [prittman@diobpt.org](mailto:prittman@diobpt.org)



### **Did you already make a gift?**

Please tell us about it! We can shout it from the rooftop or keep it quiet if you want to stay anonymous. Either way, knowing about your plans will help us better prepare for the future.



## *Our Future.*