

St. Ann Endowment Fund

A fund of the Catholic Diocese of
Madison Foundation, Inc.



The St. Ann Endowment Fund was created to fulfill a vision for our school and parish religious education programs now and for years to come. Donations made become part of the principal in the fund, which will never be spent. The income earned from the investment of the principal will provide a continuous source of future funding for Catholic Education.

Your gift to the St. Ann Endowment Fund is a reflection of your faith and love in Christ. By giving to the Endowment Fund, you can continue a sense of spirit-filled giving beyond your lifetime and contribute to the needs of the parish indefinitely.

I ask you to prayerfully consider and act upon the information highlighted in this brochure. Thank you for your ongoing commitment to Catholic Education, especially your support of our primary mission to share our Catholic faith. May God bless you for your generosity and faithfulness.

Wishing you God's
blessings,

Msgr. Gerard Healy



I have reviewed the brochure and:

- I would like to make a cash gift.
- I would like to talk to someone about including a bequest in my will to the parish endowment.
- I am interested in learning more about a charitable gift annuity option.
- I am interested in using my IRA distribution to help our parish.

Name _____

Street _____

City _____

State/Zip _____

Phone _____

Email _____

(Please complete and return. All inquiries are treated with complete confidentiality.)

If you make a gift to our parish endowment in your will, please notify the parish so that we may thank you.

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Sustaining Our Faith Ensuring Our Future



St. Ann Endowment Fund

Est. 1993



putting faith in education

A Cash Bequest = Estate Tax Savings

If you are looking for a way to make a future gift to the parish and lessen the burden of taxes on your family, a cash bequest may help achieve your goals. A bequest is one of the easiest gifts to make and can provide a substantial impact on the parish and your family. With the help of your advisor or attorney, you can include language in your will or trust specifying a gift be made to the parish as part of your estate plan. Your estate receives an estate tax charitable deduction and your gift helps further the work of St. Ann Catholic Education.

Types of Bequests

A charitable bequest may be added or modified by a *codicil*. This supplement (or addition) may be an option rather than having a new will drafted. Please contact your attorney to help you decide.

Percent Bequest: a percentage of your estate at death

Residual Bequest: the residue of your estate after all debts, taxes, expenses and specific bequests are fulfilled

General Bequest: leaving a specific dollar amount, assuming the estate has sufficient funds to fulfill the bequest

Benefits of an Endowment

The power of endowment giving is often referred to as “the gift that keeps on giving.” Why? With the establishment of our endowment, you can rest assured the investment of these funds will be professionally managed, providing a typical annual distribution that never erodes the corpus of your gift.

If you contribute regularly to our parish, consider how much your support will be missed when you are gone! By considering a bequest large or small in your estate planning, you continue to pass on the wonderful traditions of our Catholic faith. *Consider the impact the following gifts could have:*

A Parish Endowment of this amount

\$100,000

\$200,000

*Based on an annual return of 5%.

Annual distribution to parish*

\$ 5,000

\$10,000



"Each of you should give what you have decided in your heart to give, not reluctantly or under compulsion, for God loves a cheerful giver." 2 Corinthians 9:7

Types of Giving

If you choose to make a gift to the endowment now, there are a number of options you may consider. Here are just a few:

Gifts of Cash or Securities: Consider a monthly cash donation or honor the memory of a loved one with a cash memorial. You could minimize your capital gains tax of selling appreciated securities by gifting them. Making a gift to the parish endowment with cash or securities can provide you with a charitable deduction.

Charitable Gift Annuity: With a CGA, you can secure a fixed income for life while naming the St. Ann Endowment Fund as the beneficiary. With this type of life income gift you receive secure income and a charitable deduction now, with the peace of mind that the parish endowment will benefit after your death. Please contact the parish for specific information on Charitable Gift Annuities and the attractive rates they may offer.

Giving through Your IRA: If you are over age 70 ½, the Federal government permits you to rollover up to \$100,000 from your IRA directly to the parish without increasing your taxable income with the distribution. To take advantage of this opportunity, it is important to note distributions must transfer directly from your IRA trustee to the parish. Contact your IRA trustee to learn more about this easy gift option.

Life Insurance Policy: Consider naming the parish or parish endowment as the beneficiary of an existing life insurance policy.

Always consult your financial advisor, tax advisor or attorney to determine the best possible option for you.