



CATHOLIC LEGACY
SOCIETY

St. Augustine Catholic Church

301 Church Street
Kit Carson, CO 80825
(719) 962-3552 Fax: (719) 767-5272

Mailing Address: P.O. Box 82, Kit Carson, CO 80825

SAMPLE BEQUEST LANGUAGE

A gift to St. Augustine Catholic Church in your will or revocable trust proclaims your confidence that we will continue to fulfill our mission and make a difference in the lives of future generations. A bequest:

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

RESIDUAL BEQUEST: A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to St. Augustine Catholic Church, located in Kit Carson, Colorado, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its unrestricted use (or for the support of the St. Augustine Parish Endowment Fund).

SPECIFIC BEQUEST: Naming St. Augustine Catholic Church as a beneficiary of a specific amount from your estate is easy:

I give and devise to St. Augustine Catholic Church, located in Kit Carson, Colorado, the sum of \$_____ to be used for its unrestricted use (or for the support of the St. Augustine Parish Endowment Fund).

CONTINGENT BEQUEST: St. Augustine Catholic Church can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to St. Augustine Catholic Church, the sum of \$_____ (or all or a percentage of the residue of my estate) to be used for its unrestricted use (or for the support of the St. Augustine Parish Endowment Fund).

RETIREMENT PLAN: You may name St. Augustine Catholic Church as a beneficiary of your IRA or other qualified retirement benefits. To make a charitable gift from your retirement plan, simply enter the St. Augustine Catholic Church name and Federal Tax ID #84-1042155 on the Change of Beneficiary Form, available from your plan administrator. Consult with your advisor to determine the benefits you would derive from such a gift.

FOR FURTHER INFORMATION: We would be pleased to work with you and your advisor to determine the gift that best suits your situation and interests. For confidential information on how to create a legacy gift or for additional information on enrollment in the Catholic Legacy Society, please contact Peggy Cusick, Director of Parish Legacy Initiative, at (719) 866-6518 or pcusick@diocs.org. Visit our website at www.diocsGiftLegacy.org.

Neither the Diocese of Colorado Springs nor its parishes are engaged in rendering legal or tax advisory services. The above language is intended solely for general information purposes. For advice and assistance in specific cases, legal counsel should be obtained.



CATHOLIC LEGACY SOCIETY

The *Catholic Legacy Society* was created to honor our legacy donors who have named their parish, a Catholic school or a ministry of the Diocese of Colorado Springs as a beneficiary in their will or trust, retirement account, charitable gift annuity or charitable trust, life insurance policy, or through the establishment of an endowed fund.

The Diocese is grateful to acknowledge these special benefactors during their lifetimes. And, in conjunction with our mission, this special society provides an opportunity for benefactors to make their philanthropy a perpetual legacy for themselves and an example for their families. It also creates an infrastructure of support that makes our parishes, schools and ministries stronger, sustainable and better equipped to reach future generations.

If you have named your parish, a Catholic school or a ministry of the Diocese of Colorado Springs in your estate plan, or are considering doing so, we invite you to become a member of the *Catholic Legacy Society*.

ENROLLMENT FORM

Full Name: _____ Date of Birth: _____

Spouse's Full Name: *(where applicable)* _____ Date of Birth: _____

Street Address: _____

City/State/Zip: _____

Phone Number: (_____) _____ Email: _____

Parish: _____

Name(s) as you would like to appear on membership list, or write "Anonymous":

I have remembered _____ [Name of parish, Catholic school, or other Diocesan organization] as a beneficiary of one or more of the following instruments:

- Last Will and Testament
 Retirement Plan
 Real Estate
 Charitable Remainder Trust
 Living Trust
 Life Insurance Policy
 Charitable Gift Annuity
 Other: _____

The gift is to be used for _____ (Unrestricted Use, Parish Endowment Fund, Other).

The current value of the gift is approximately \$ _____ or _____ % of the above planned gift.

Your membership in the *Catholic Legacy Society* means that:

- The amount of your intended gift is never publicly disclosed
- You will be remembered each week at a Mass offered for your intentions
- You will receive a personal invitation to attend the annual Induction Mass offered by our Bishop to recognize new and existing members of the *Catholic Legacy Society*
- Your name will appear on *Catholic Legacy Society* membership list as an encouragement to other faithful Catholics who may be considering a similar act of generosity

Signature: _____ Date: _____

Spouse's Signature: _____ Date: _____

There is no minimum planned gift amount to become a member of the Catholic Legacy Society of the Diocese of Colorado Springs. Your membership will be completed with this signed and returned form. Thank you!

PLEASE RETURN TO:

Director of Parish Legacy Initiative, Diocese of Colorado Springs
228 N. Cascade Avenue, Colorado Springs, CO 80903 | Phone: 719.866.6518 | Fax: 719.866.6530
pcusick@diocs.org | www.diocsGiftLegacy.org