

	DETAILS	BENEFITS TO YOU	FOR MORE INFO
BEQUEST	<p>A bequest is created through your estate plan, such as in a will or revocable living trust.</p> <p>You can make your bequest or beneficiary designation a:</p> <ul style="list-style-type: none"> • specific amount • percentage • remainder 	<p>Simple Flexible You retain control throughout your lifetime.</p> <p>A bequest or beneficiary designation to Catholic Charities takes those assets out of your taxable estate.</p>	<p>Contact an attorney specializing in bequests – a gift through your will.</p> <p>Contact the Development office at Catholic Charities by calling 405-526-2323.</p> <p>You can also email cjeffreys@ccaokc.org for more information or to request proper forms.</p>
BENEFICIARY DESIGNATION	<p>Fill out a beneficiary form from your provider, your bank or the title for:</p> <ul style="list-style-type: none"> • Insurance policy • Retirement accounts • Bank Accounts • Automobiles 	<p>Naming a beneficiary helps ensure a smooth transfer of your plan benefits to the person (or people), organization, trust or other legal entity you choose.</p> <p>Having an up to date beneficiary designation ensures your assets go where you intended.</p>	<p>Contact an attorney specializing in beneficiary designations.</p>
CHARITABLE GIFT ANNUITY	<p>Simple, contractual agreement between Catholic Charities and a donor in which assets are transferred to Catholic Charities in exchange for lifetime payments.</p> <p>Annuity payments can be for one or two persons. Rates are based on age and range from about 4.7 percent to 9.5 percent.</p>	<p>Immediate tax deduction for portion of gift.</p> <p>Annuity payments may be partially tax-free.</p> <p>When funded with appreciated securities, capital gains liability reduced.</p>	<p>Contact your financial advisor to learn minimum requirements.</p>
CHARITABLE REMAINDER TRUST	<p>Donate assets to a charitable trust which provides a variable stream of income for a term of years.</p> <p>A variation of this is called a charitable annuity trust which provides a fixed-amount payment throughout the term of the trust.</p>	<p>Immediate tax deduction for portion of gift.</p> <p>Can fund with appreciated securities which will reduce capital gains liability.</p> <p>Real estate can be used to create a remainder trust with approval of Catholic Charities.</p>	<p>Contact a will & trust attorney specializing in this type of trust or your financial advisor.</p>
LIFE ESTATE DEED	<p>Give your home or farm but retain the right to live in or make a living on during your lifetime.</p>	<p>Receive current charitable tax deduction and future benefits to your taxable estate.</p> <p>Make a significant gift to Catholic Charities.</p>	<p>Contact a will & trust attorney specializing in this type of deed.</p>

<p>CHARITABLE LIFE INSURANCE POLICY</p>	<p>Make Catholic Charities the owner of your policy, as well as the beneficiary.</p> <p>Allows an individual to work with a charitable organization to own a life insurance policy on the donor, who in return donates to the charity their yearly premium to receive the tax benefit.</p>	<p>You receive an income tax deduction for gift of policy and for any premium payments you continue to pay.</p>	<p>Contact your life insurance agent specializing in this type of designation for your policy</p>
<p>REVOCABLE LIVING TRUST</p>	<p>A revocable living trust – sometimes called a living trust is a legal entity created to hold ownership of an individual’s assets.</p> <p>The person who forms the trust is called the grantor and may also serve as the trustee, controlling and managing the assets placed in the trust.</p>	<p>A revocable living trust can prevent the details of one’s estate from becoming available to the public.</p> <p>The grantor reserves the right to undo a revocable trust. The grantor can reclaim assets, divert the trust’s income to another beneficiary or sell the assets. The grantor maintains final control.</p> <p>Could save you thousands of dollars in legal fees.</p>	<p>Contact a will & trust attorney specializing in this type of trust.</p>