



transform
THE FUTURE

What is Planned Giving?

Planned giving is a method of charitable giving that involves financial and estate planning. There is a common misconception that planned giving is “just for the wealthy.” But, because planned giving allows individuals to give from their assets and not just from their income, planned giving is for *everyone*. In many cases, planned giving allows people to make gifts they never dreamed possible in ways they may have never considered. The result? A donor is provided with the means to express the deep and profound love they have for the Church. They have been empowered to endow a lasting transformation.

The Catholic Foundation for the Archdiocese of Dubuque assists donors in creating a meaningful and lasting impact through planned giving and charitable fund management.



Assets Used in Planned Giving

People can make planned gifts with a variety of assets. Being able to give assets besides cash opens up a great deal of opportunity. Here are some of the types of assets people can use to make gifts:

- Cash
- Stocks and bonds
- Real estate
- Closely held stock
- Life insurance
- Retirement plans
- Tangible personal property

Types of Planned Gifts

Some ways that people can make planned gifts include:

- Outright gifts (the Church gets the property immediately)
- Bequests through their wills
- Charitable gift annuities
- Charitable remainder trusts
- Charitable lead trusts

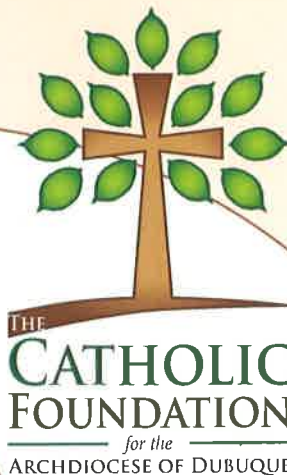
“Planned giving in the Church is a way to help people respond to God’s gifts to them in ways that fit their own individual situation.”

Financially, planned gifts can be very beneficial for donors. By making a planned gift, donors can:

- Bypass capital gains taxes
- Increase current income
- Increase current income tax deductions
- Increase estate and gift tax deductions
- Conserve estate assets for heirs -- even pass on larger estates in some situations

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