



WHY SHOULD I CONSIDER A PLANNED GIFT TO HOLY TRINITY?

A planned gift allows you to support the Church's mission beyond your lifetime while often providing financial benefits such as tax savings. It's an opportunity to express gratitude for your faith and make a lasting impact on Holy Trinity, the Archdiocese, our Catholic school, charities, or ministries.

WHAT IS PLANNED GIVING?

Planned giving refers to charitable gifts made as part of a donor's estate or financial planning. These gifts often provide long-term support for the Catholic Church and can include bequests, beneficiary designations, charitable trusts, real estate, or annuities.

HOW DOES A PLANNED GIFT DIFFER FROM REGULAR DONATIONS?

Regular donations are typically immediate gifts (such as Sunday offerings or special collections), while planned gifts are future-focused and usually come from your estate, investments, or financial assets.

DO I HAVE TO BE WEALTHY TO MAKE A PLANNED GIFT?

No! Planned gifts are for everyone—not just the wealthy. Even a small percentage of an estate or retirement fund can make a significant difference in the Church's mission.

CAN I CHOOSE HOW MY PLANNED GIFT IS USED?

Yes! You can designate your gift for a specific purpose. You may also make an unrestricted gift, allowing the Church to use it where it's most needed.

IS IT DIFFICULT TO INCLUDE THE CHURCH IN MY WILL?

No, adding the Church as a beneficiary in your will or trust is simple. Your attorney can include language such as: *"I give and bequeath to [Name of Parish/Diocese/Catholic Charity], a nonprofit organization located at [Address], the sum of \$___ (or ___% of my estate) to be used for its general charitable purposes (or for a specific purpose such as youth ministry, Catholic education, etc.)."*

WHAT IS THE BENEFIT OF NAMING THE CHURCH AS A BENEFICIARY OF MY RETIREMENT ACCOUNT?

Retirement accounts (such as IRAs, 401(k)s, or 403(b)s) are taxable to heirs but tax-free to charities. Naming the Church as a full or partial beneficiary allows more of your assets to support your faith without estate or income taxes reducing their value.

CAN I DONATE LIFE INSURANCE TO THE CHURCH?

Yes, you can! This is an easy way to make a larger gift than you might be able to give during your lifetime.

WHAT IS A CHARITABLE GIFT ANNUITY (CGA)?

A Charitable Gift Annuity (CGA) allows you to donate to the Church while receiving fixed lifetime payments in return. At the end of your life, the remaining funds support the Church's mission.



HOW DOES A CHARITABLE REMAINDER TRUST (CRT) WORK?

A Charitable Remainder Trust (CRT) provides you (or your heirs) with income for life or a set term, after which the remainder goes to the Church.

WHAT IS A CHARITABLE LEAD TRUST (CLT)?

A Charitable Lead Trust (CLT) provides income to the Church for a set period. Afterward, the remainder goes to your heirs—often with significant tax savings.

CAN I DONATE REAL ESTATE OR OTHER PROPERTY?

Yes! You can donate homes, land, vacation properties, personal assets such as jewelry or artwork, vehicles, and business assets. This can provide tax benefits and eliminate the burden of maintaining or selling the property.

WILL MY PLANNED GIFT BE KEPT CONFIDENTIAL?

Yes! The Church respects donor confidentiality. However, if you wish, you may publicly recognize your gift to inspire others.

CAN I MODIFY MY PLANNED GIFT IF MY CIRCUMSTANCES CHANGE?

Yes! You can revise your will, trust, or beneficiary designations at any time to reflect changes in your financial situation or personal priorities.

WILL MY PLANNED GIFT IMPACT MY CHILDREN'S INHERITANCE?

Not necessarily. Many donors designate only a portion of their estate for the Church, ensuring their heirs still receive a substantial inheritance. You can also use tax-efficient giving strategies to maximize the value of both charitable and family gifts.

CAN I MAKE A PLANNED GIFT WHILE I'M STILL ALIVE?

Yes! Many planned giving options, such as charitable annuities, trusts, and direct donations, allow you to witness the impact of your generosity while still alive.

WHAT ARE THE TAX BENEFITS OF PLANNED GIVING?

Depending on the type of gift, benefits could include the following:

- Income tax deductions.
- Reduced capital gains tax on appreciated assets.
- Estate tax reductions, lowering the taxable value of your estate.

DO I NEED AN ATTORNEY TO MAKE A PLANNED GIFT?

For simple gifts (like beneficiary designations), an attorney is not required. However, for wills, trusts, and real estate donations, it is advisable to consult an attorney or financial advisor to ensure proper legal documentation.

WHO CAN I CONTACT TO DISCUSS MY PLANNED GIFT?

If you're interested in leaving a planned gift to the Holy Trinity, you can:

- Speak with Jackie Ehler, Director of Stewardship and Development
 - Contact the Catholic Foundation or Development Office for the Archdiocese of Kansas City in Kansas.
 - Consult a financial advisor or estate planning attorney.
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