

## Gift & Estate Planning

As we confront the challenges of the future, we know that the generosity of those who assist us will make all the difference in our success. That's why we seek your support. But we also want to make sure that you benefit from making a gift to us.

How does this happen? Of course, you have the satisfaction that comes from knowing you've made a difference in the lives of others. But in fact, the best gift plans also improve your financial and tax situation, often right away.

There are many ways that your philanthropic giving can blend with your own financial needs and tax planning. To design a gift that benefits the people and organizations you care about most, we recommend that you obtain the professional counsel of an attorney who specializes in gift and estate planning. We can work with your advisors to help you plan for tomorrow and receive maximum benefits today.

Benefits:

- Current income tax deduction
- Avoidance of long-term capital gains tax
- Increase in income and effective rate of return
- Reduction in estate and gift taxes

### **A Current Will – A Vital Document**

Drafting a will may seem like a daunting task at first, until you realize all the good that comes from having a will. A bequest in your will lets you pass any amount you wish to us free of estate tax. You can give cash or specific property, a dollar amount or a percentage of your estate, with restrictions or without. To make sure your will accomplishes your goals according to your wishes, we recommend that you obtain the professional counsel of an attorney who specializes in probate and estate planning.

Benefits:

- Lets you provide for your family after your death
- Allows you to distribute your assets according to your wishes
- Saves on estate taxes, with proper planning
- Lets you leave a legacy without giving up assets

Contact the Benedictine Sisters Development Office for More Information

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