



# LEAVE A BEQUEST

The Catholic Foundation can help you build charitable giving into your estate plans, to help you achieve tax advantages and leave an everlasting legacy to your parish, school or favorite Catholic ministry. One way to do this is through a bequest.

## What is a Bequest?

A bequest, the most common form of planned giving, is a gift of assets (money and/or other property) that is made through your will, living trust or beneficiary designation. No funds are transmitted or irrevocably transferred to the designated charity until after your death. No estate tax will be owed on the amount of the charitable bequest.

You can also designate a Catholic Foundation fund as the beneficiary of a life insurance plan, pension plan or retirement account, such as an IRA.

## Sample Bequest Language

The following is suggested bequest language your attorney may use in preparation of your Will or other documents:

“I/we the undersigned, give (a percentage, specific dollar amount, or the residual) of my/our estate to:

Foundation of the Diocese of Columbus (dba The Catholic Foundation)  
257 East Broad Street Columbus, Ohio 43215  
Tax I.D. #31-111-6640

For the benefit of \_\_\_\_\_ Endowment Fund, held at The Catholic Foundation.”

## Directing your Funds

You can use a charitable bequest to create an endowment fund to support your favorite Catholic ministry, or to add to an existing fund. Contact The Catholic Foundation at 614-443-8893 to learn more.

## Kyrie Bequest Society

Simply by naming The Catholic Foundation in your will, living trust, or beneficiary designation, you become a member of the Foundation’s Kyrie Bequest Society, which honors those who remember our Catholic faith in their estate plans. The Kyrie Bequest Society celebrates an annual Mass and luncheon with the Bishop of Columbus.

To complete your induction into the Kyrie Bequest Society, please notify The Catholic Foundation of your estate plans by calling 614-443-8893.

