

Legacy and Planned Giving

The work, mission, and ministries of **Saint Paul the Apostle Old Catholic Church** are active and integral to our community and the **Old Catholic Diocese of the Southeast** at large. With the help of financial supporters like you, will continue far into the future. You can continue to support the parish and its work even after your lifetime through a legacy or planned gift.

You do not have to be wealthy to make a planned gift – only willing to include the Parish in your plans. Your financial advisor can help you choose the best type of gift for you and structure it so that your loved ones are taken care of first.

Ways to Give

Here are a few simple ways that you can easily make a legacy or planned gift to **Saint Paul the Apostle Old Catholic Church**:

Bequest

One of the simplest ways to make a legacy gift is to name the Parish as a beneficiary in your will. If your will is already prepared, your advisor can add an amendment (codicil). Sample bequest language is available on request.

Charitable Gift Annuities

Charitable gift annuities and trusts provide a tax deduction, additional retirement income and the ability to make a substantial legacy gift.

Property and Securities

Real estate and marketable securities such as stocks and bonds can also be gifted to the Parish.

IRA

Tax deferred retirement plans, such as IRAs are subject to income and estate taxes, which reduces the amount your heirs will receive significantly. To maximize use of these funds and reduce your heir's tax burden, you can gift a portion of your IRA in two ways: through your estate plan, or after age 70 ½+ by making a charitable IRA rollover from your annual disbursement.

Life Insurance

You can receive a charitable tax deduction by naming the Parish as an irrevocable beneficiary of your life insurance policy.

To learn more about how to make a legacy or planned gift to **Saint Paul the Apostle Old Catholic Church**, contact the Parish office.