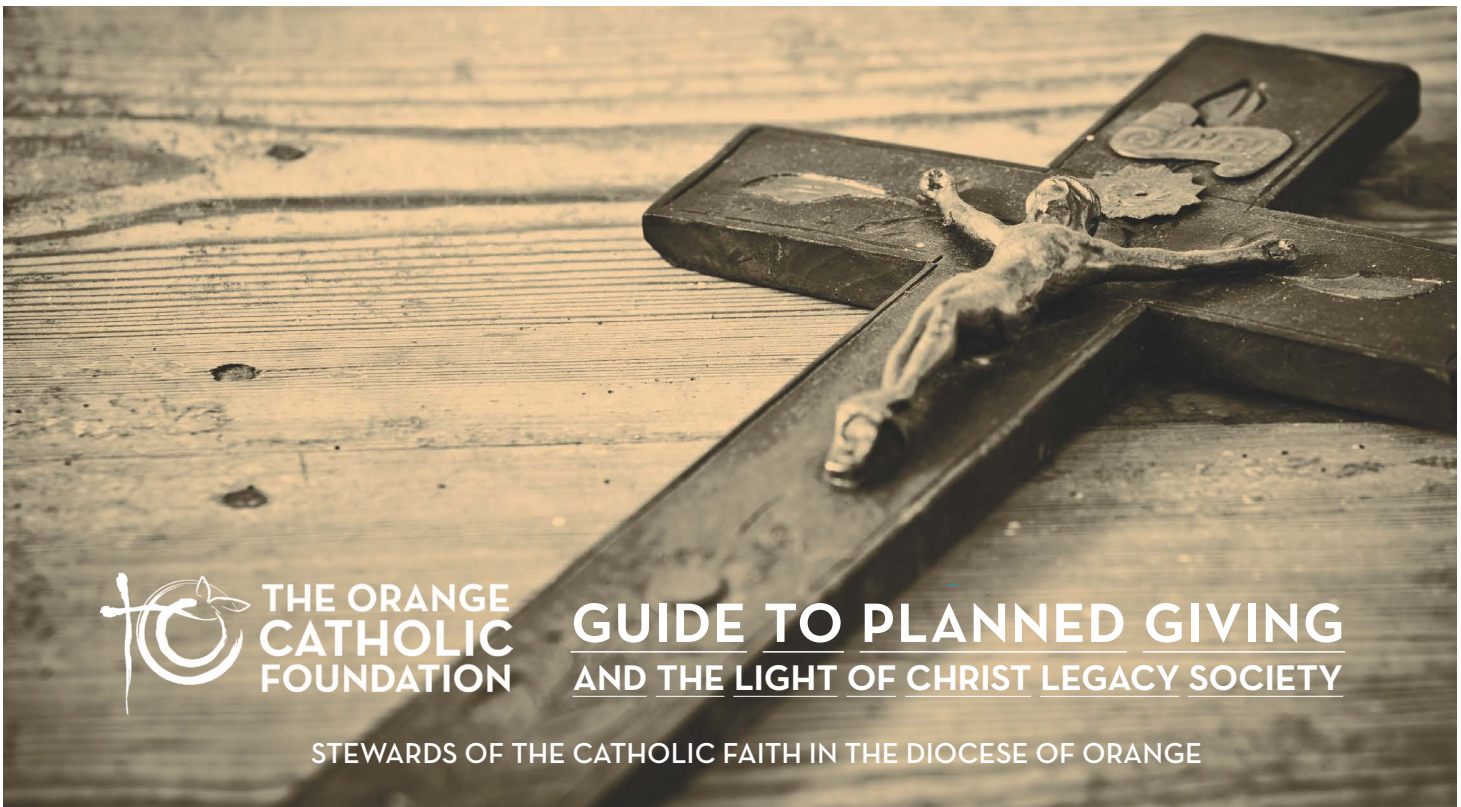




Leave a legacy of faith.



THE ORANGE
CATHOLIC
FOUNDATION

GUIDE TO PLANNED GIVING
AND THE LIGHT OF CHRIST LEGACY SOCIETY

STEWARDS OF THE CATHOLIC FAITH IN THE DIOCESE OF ORANGE



TYPES OF GIFTS

Securities: Your securities, including your stocks, mutual funds, or bonds, can be given as a gift. In doing so, you may avoid paying capital gains tax that would otherwise be due if you sold these assets.

Life Insurance: You can make a generous gift to your parish, a school, or the Diocese of Orange by including the Orange Catholic Foundation as a beneficiary, contingent beneficiary, or owner of a new or existing policy.

Real Estate: If you own appreciated real property such as your home, vacation property, vacant land, farmland, ranch, or commercial property, you may avoid paying capital gains tax by making it a gift to the Orange Catholic Foundation.

Retirement Funds: Retirement assets can be the most heavily taxed assets in your estate. Potential estate and income taxes may be avoided by naming the Orange Catholic Foundation as a beneficiary of the remainder retirement assets.

**For where your treasure is,
there also will your heart be.**

- Luke 12:34

HOW TO GIVE

Bequest of a specific asset, percentage of estate assets, or a specific sum of money can be gifted to the Orange Catholic Foundation. The gift can be for a designated purpose or to establish your own endowment fund.

Charitable Lead Trust is a trust that makes payments to the Orange Catholic Foundation during the term of the trust. At the end of the term, the trust's remaining assets are returned to the donor or transferred to others named by the donor.

Life Income Strategies offer a variety of ways that give you income now. They are irrevocable and provide immediate tax benefits.

Charitable Remainder Trust provides you and/or your beneficiary with an income for life or a term of years. The income can be a fixed annual amount or a percentage of the trust value each year.

Charitable Gift Annuity allows you to transfer an asset in exchange for fixed annual payments to you for one or two lifetimes. Rates are determined by the age of the donor(s) and vary each year. The Orange Catholic Foundation provides charitable gift annuities through the Orange County Community Foundation's Gift Annuity Program.





THE JOY OF STEWARDSHIP

Good Catholic stewardship – giving back to God of the gifts we have been given – is both an honor and an opportunity. It is a response of true discipleship and an expression of love.

WAYS TO GIVE

Donor-Advised Funds: An individual (or a family) can establish a donor-advised fund in their name, serve as advisers, and make requests for distributions to their parish or other Catholic charity from the fund. Those with a donor-advised fund receive an immediate tax deduction and can support their favorite charitable causes over time by making recommendations for grants to the charities of their choice while the Orange Catholic Foundation takes care of the legal, financial, and administrative burdens.

Donor-advised funds can be endowed (meaning that only the earnings, and not the principal, are used to make grants) or non-endowed (distributions can be made from both principal and income).

Endowment Funds: As times change, so do the needs of the Diocese of Orange. A contribution to one of the Orange Catholic Foundation's endowment funds allows your contribution to continually meet Diocesan needs as they evolve over time. You can contribute to any of the Orange Catholic Foundation's established endowed funds or work with our staff to create a customized fund.



LIGHT OF CHRIST
LEGACY SOCIETY

The **Light of Christ Legacy Society** is a symbol of your faith in the vital ministries provided by our Catholic Church of Orange. The Light of Christ Legacy Society is a reminder of the Orange Catholic Foundation's mission to support all aspects of our Catholic faith and symbolizes our vision of reaching and serving the faithful in Orange County, California and beyond.

The Light of Christ Legacy Society was established to recognize and thank supporters of the Diocese of Orange who provide for the long range financial stability of our Catholic parishes, schools, and ministries of our local Church of Orange.

Please consider including the Orange Catholic Foundation in your long-range financial plans. By prayerfully discerning this now, you may find the tax advantages can potentially increase the value of your estate, enabling you to do more than you dreamed possible.

For more information: PlannedGiving@OrangeCatholicFoundation.org or 714.282.3021.



The financial decisions you make today will define your legacy.

The Orange Catholic Foundation can be a resource as you build your legacy of faith. The Orange Catholic Foundation is a 501(c)(3) charitable corporation and an autonomous pious foundation that exists to serve the Diocese of Orange, including its parishes, schools, and overall diocesan mission.

- Your gift helps you with tax advantages and/or with income; it can help you clarify your wishes for your family, and it can reflect your faith.
- Your gift helps the Catholic Church in a very substantial way by supporting long-term needs in our parishes, schools, and ministries in the Diocese of Orange.
- Restricted vs. Unrestricted: You can designate a local Catholic cause that you would like to support. Or you can choose to give an unrestricted gift, trusting the Orange Catholic Foundation to use your funds in beneficial ways to support our Catholic faith.

The Orange Catholic Foundation has a specific website just for Catholic estate planning needs. It contains more information for you and your advisers. Go to OrangeCatholicFoundation.org, and under the “What to Support” webpage, click on “Planned Giving.”



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plannedgiving@OrangeCatholicFoundation.org

This brochure is for informational purposes only and not intended to replace legal advice. The Orange Catholic Foundation does not provide legal or accounting services but is happy to work with donors during this important process.

Start building your legacy of faith now.