

## *Estate Planning Strategies for Faithful Catholics*

While arranging your legacy and estate planning, you may want to consider faith inspired options:

### ***Lasting Legacy Estate Planning***

Through thoughtful estate planning, both taxes and legal fees can be reduced or eliminated to leave a larger lasting legacy, including financial support of your charitable wishes.

### ***Protecting Privacy and Avoiding Probate***

A Living Trust can prevent your assets from a costly and public court administration.

### ***Give It Twice Trust***

This type of trust protects your heirs from wasting inheritance, provides lifetime family income and supports Catholic charity.

### ***Catholic Legacy Will***

With a Catholic Legacy Will, you can honor your faith and pass on your beliefs to your loved ones.

### ***Catholic Medical Declaration***

Provide a Medical Declaration to reflect Catholic teachings for the protection of the Sanctity of Life and to direct your care wishes.

### ***Sacraments Directive***

Be sure a Catholic Priest will be called to give you the Sacraments, including an Apostolic Pardon, and assure a proper Catholic funeral and burial.

Please consider remembering  
our worthwhile mission  
to share the Message of Lourdes,  
to serve the sick and disabled at Lourdes  
and to bring those in need to the Grotto:

*“With gratitude for all God has given me,  
I give, devise and bequeath to  
Our Lady of Lourdes Hospitality  
North American Volunteers*

**10%**

**or a specific percentage or share**

*of the remainder of my estate  
after all debts, taxes, expenses  
and family bequests have been paid.”*

If you will be including us in in your estate planning, we request you contact us so we may thank you and offer prayers for your gift.



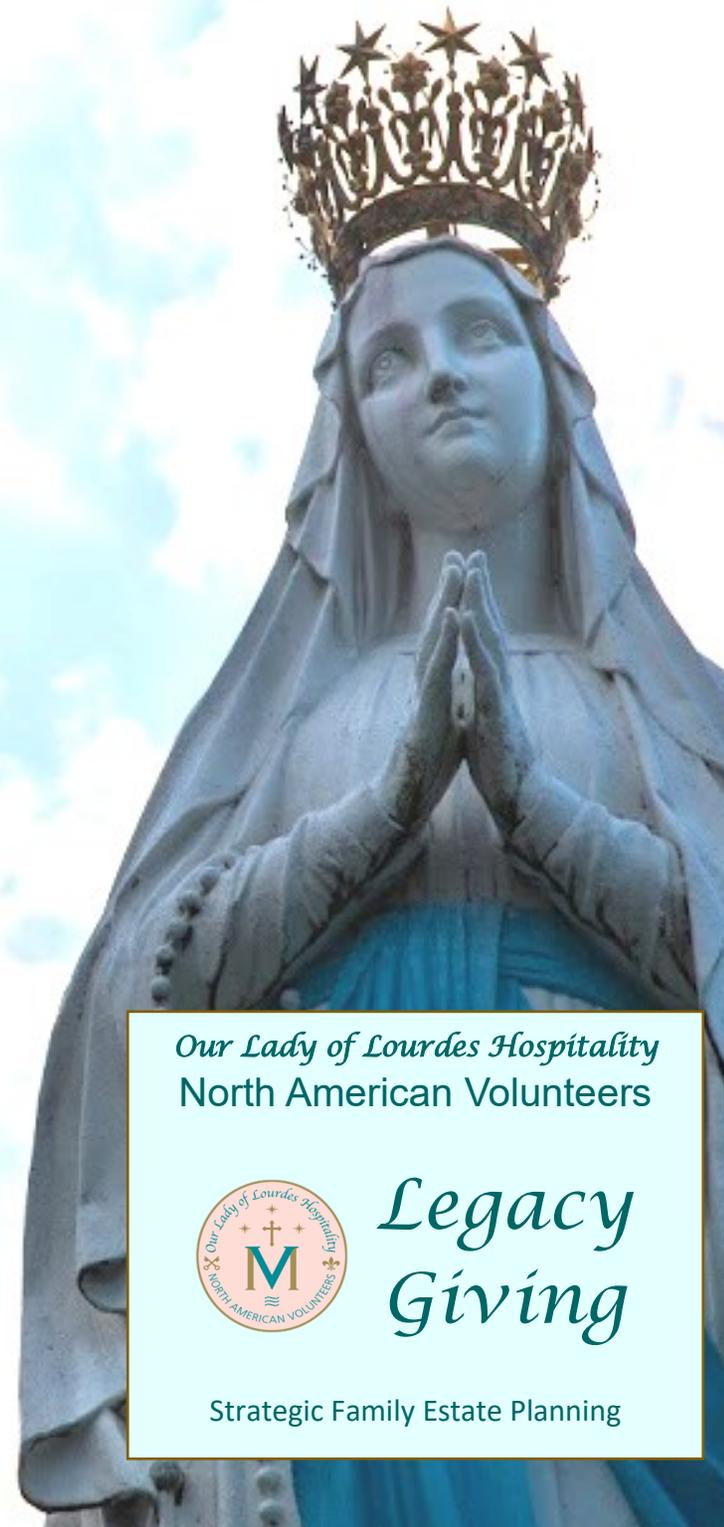
*Our Lady of Lourdes Hospitality  
North American Volunteers*



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*Our Lady of Lourdes Hospitality  
North American Volunteers*



*Legacy  
Giving*

Strategic Family Estate Planning

## *What Will Your Legacy Be?*

As Catholics, we are called to be faithful stewards of our blessings. We are to provide both for our families and Catholic communities. Fortunately, today there are time-tested proven planning strategies to guide and enable us to protect the financial security for our families and to leave a legacy to support our favorite Catholic charity.

A stewardship based approach to estate planning recognizes the need to reduce taxes, legal fees and court costs. The savings from proper estate planning can only benefit surviving family.

## *Protecting Your Family*

A good estate plan enables your affairs to be handled in a way assuring your family will be well protected.

Wills, Trusts, Powers of Attorney and Advanced Medical Directives make your wishes known and to be clearly understood, reducing the likelihood of family disagreements or disputes.

## *A Good Inheritance*

Your family benefits from your estate planning when receiving an inheritance undiminished by estate shrinkage with the good example of your charitable giving and blessings of the Sacraments.

Following your example of thoughtful planning and generous giving, your heirs can maintain your charitable wishes in their own estate planning. Your legacy can continue through their charitable generational generosity in your memory.

## *Remembering Lourdes Volunteers*



*“I will forget no one.”*

—St. Bernadette Soubirous

Partner with us to ensure our holy work  
continues for generations  
by leaving a gift of grace  
to be lived in others  
through the Message of Lourdes,  
in the loving example of St. Bernadette.

**CCC 1822 Charity is the theological virtue  
by which we love God above all things,  
for His own sake,  
and our neighbor as ourselves,  
for the love of God.**

*We invite you to make  
your lasting legacy a  
Lourdes Legacy!*

## *Planned Gifts*

### ***A Bequest In Your Will or Trust***

Make a specific bequest in your will or trust in a fixed amount or as a percentage gift.

Please consider adopting Lourdes Volunteers as your “heir association” or “additional child” to share with your children in your estate or trust.

### ***Charitable Gift Annuity***

To help you generate tax wise income in a way that also supports your Catholic charitable giving.

### ***IRA, Retirement Asset or Insurance Policy***

Retirement assets are the most heavily taxed of assets. Making charitable gifts of these assets can save significant income and estate taxes.

The gift of an interest or a percentage of an IRA, a retirement asset or an insurance policy by naming Lourdes Volunteers as a beneficiary.

### ***Charitable Trusts***

The two most common types of charitable trusts for lasting legacies are charitable remainder trusts and charitable lead trusts.

### ***Giving Tax Monies To Charity***

With careful estate planning, you can distribute your monies to charity that would otherwise have been given in taxes.

## *Legacy Giving*

Please contact  
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(315) 476-0026