

## Bulletin Notes for October 2017

If you have any questions regarding the bulletin notes, please contact Maureen Cully, Manager of Marketing and Communications @404-497-9440 or [mcully@cfnga.org](mailto:mcully@cfnga.org).



### **October 1:**

#### **Plan Your Will Online:**

Have you been procrastinating about getting a Will? The Catholic Foundation has made the process of planning your Will simple. Please go to [www.cfngalegacy.org](http://www.cfngalegacy.org) and click on "Plan Your Will." The site is free, confidential and will give you and your spouse a chance to plan in the privacy of your home. When done, simply print out the document to take to your attorney. This will save you time and money. When planning, please consider including the parish endowment fund as one of the beneficiaries of your assets or even to receive the remainder of your estate. For more information contact: Juliet Greco at the Catholic Foundation of North Georgia: [jgreco@cfnga.org](mailto:jgreco@cfnga.org) or 404-497-9440.

### **October 8:**

#### **Stay in your home and receive a Charitable Tax Deduction**

A Life Estate Reserved may be the plan for you. With this plan, you deed your home to the Catholic Foundation of North Georgia to benefit your parish endowment fund, and you reserve the right to continue using it for life. You receive the tax deduction now, but will be responsible for the upkeep of the home. For more details about a Life Estate Reserve plan you can go to [www.cfnga.org](http://www.cfnga.org) or contact Juliet Greco at the Catholic Foundation of North Georgia: [jgreco@cfnga.org](mailto:jgreco@cfnga.org) or 404-497-9440. To learn more about Wills and Estate Planning please visit [www.cfnga.org](http://www.cfnga.org).

### **October 15:**

#### **Gifts of Insurance:**

Insurance is a great way to give a larger gift to the parish endowment fund or building fund than you would normally be able to give through cash. You can do this by designating the parish endowment fund as the beneficiary of your insurance. Speak with your insurance professional about the tax benefits in life and through your estate. For additional information regarding gifts of insurance, please contact Juliet Greco at the Catholic Foundation of North Georgia [jgreco@cfnga.org](mailto:jgreco@cfnga.org) or 404-497-9440. You can also read about additional types of planned gifts at [www.cfnga.org](http://www.cfnga.org).

### **October 22:**

#### **Making a gift to the parish through your retirement plan**

Many people would like to help the parish with a cash gift, but are not sure what they are going to need when they retire. So a very simple way to make a gift to the parish is to make the parish one of the beneficiaries of your IRA, 401K, or other retirement plan. Simply call the organization that manages your plan and ask for a change of beneficiary form. You can leave a dollar amount or a percent of the remainder of your plan. This will go directly to the parish to help them for the future. For more ways to help your parish with a future gift please contact Juliet Greco at the Catholic Foundation of North Georgia 404-497-9440 or email [jgreco@cfnga.org](mailto:jgreco@cfnga.org).

## **October 29**

### **Honor a Loved One and Help the Parish**

This November 2<sup>nd</sup>, we celebrate All Souls Day. To remember your loved one, you can create an endowment fund in honor of or in memory of someone special in your life and name the parish as the beneficiary. It only takes \$5,000 to start a fund, and then you can add to it each year. When the fund reaches \$25,000, distributions will be made to the parish annually. This is a wonderful way to remember your loved ones, receive a tax deduction, and benefit the parish now and forever. For details contact: Juliet Greco at the Catholic Foundation of North Georgia: [jgreco@cfnga.org](mailto:jgreco@cfnga.org) or 404-497-9440. More estate planning ideas are available at [www.cfngalegacy.org](http://www.cfngalegacy.org).

### **FOR PARISH STAFF INFORMATION AND ACTION**



[#iGiveCatholic](#) is coming to the Archdiocese of Atlanta on November 28! **Every Catholic parish, school, and ministry will have the opportunity to participate and raise annual giving or special project dollars!** Register your organization and sign up for training now by calling the Catholic Foundation at 404-497-9440. Sponsored by the Catholic Foundation of North Georgia and the Archdiocese of Atlanta.