



The Catholic Foundation
Planning Your Legacy



Leave a Bequest

The Catholic Foundation can help you build charitable giving into your estate plans, to help you achieve tax advantages, and to 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 The Catholic Foundation 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:

For Planned Gift Agreement purposes: "I instruct my executor to distribute [specific amount or percentage] of my estate to The Catholic Foundation of the Diocese of Lansing, located at 101 S. Washington Sq., Suite 620, Lansing, MI 48933 - Tax ID 81-2025056 as outlined in the Planned Gift Agreement I have on file with them. The gift should be used in accordance with the terms specified in that agreement."

For general purposes: "I/we give (a specific dollar amount, percentage, or the residual) of my/our estate at death to The Catholic Foundation, 101 S. Washington Square, Suite 620, Lansing, MI 48933 - Tax ID 81-2025056, to be used for the benefit and unrestricted use of (The Catholic Foundation, or your Catholic parish, school, favorite ministry, or agency name)."

For specific purposes: "I/we give (a specific dollar amount, percentage, or the residual) of my/our estate at death to The Catholic Foundation, 101 S. Washington Square, Suite 620, Lansing, MI 48933 - Tax ID 81-2025056, to be (used for name of specific program or ministry, or to be placed in name of specific fund or endowment)."

Directing your Funds

You can use a charitable bequest to create an endowment fund to support your favorite Catholic parish, school, or ministry, or to add to an existing endowment. Contact The Catholic Foundation at 517-253-8787 to learn more.

Immaculate Conception Legacy Society

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

To complete your induction into the Immaculate Legacy Conception Society, please notify The Catholic Foundation of your estate plans by calling, 517-253-8787.

We'd like to assist you with your plans to create an endowment fund to support your favorite Catholic ministry, or to select an existing fund to support. Contact The Catholic Foundation at 517-253-8787 to learn more.