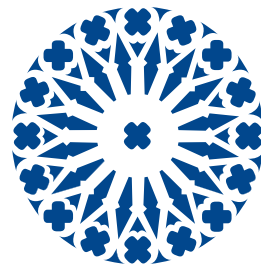


**THE CATHOLIC FOUNDATION  
IS GRATEFUL FOR THE  
GENEROUS SUPPORT OF  
PEOPLE THROUGHOUT OUR  
COMMUNITY. THIS GUIDE  
OFFERS DONORS, ATTORNEYS,  
TAX PROFESSIONALS AND  
FINANCIAL ADVISORS AN  
INTRODUCTION TO CHARITABLE  
GIFT PLANNING OPPORTUNITIES  
AT THE CATHOLIC FOUNDATION.  
WE CAN ASSIST DONORS IN  
SUPPORTING OUR PROGRAMS  
TODAY OR CREATING A PLAN  
FOR TOMORROW. PLEASE  
CONTACT US TO LEARN MORE.**



**LISA BROWN**  
Charitable Giving Advisor  
lbrown@dioceseoflansing.org  
Direct: 517-253-8738



*The Catholic Foundation does not offer tax or legal advice, and encourages donors to consult with their advisors regarding this information.*



**The Catholic Foundation**

Serving the Church in the Diocese of Lansing

101 S. Washington Square, Suite 620

Lansing, MI 48933

517-253-8787



## The Catholic Foundation *Advisor's Guide*

*Partnering with donors  
and professional  
advisors to bring the  
light of Jesus Christ  
to the world.*

## Collaborate

Working together with donors and advisors, we can help integrate charitable giving plans into broader financial goals. All inquiries are welcome and confidential.

## Give For Impact

Our team can help plan a meaningful gift that makes a difference in the lives of faithful Catholics and the future of our Church.

## Save Taxes

Determining which assets to donate, and when, can result in substantial tax savings, allowing donors to give more, maximizing the impact of a gift.

## Gift Options

The Catholic Foundation may accept the following gifts, which can also be made in memory or in honor of a special person:

Bargain Sales	Life Insurance Beneficiary Designation
Bequests	Oil, Gas, and Mineral Interests
Cash	Real Estate
Charitable Lead Trusts	Remainder Interests in Properties
Charitable Remainder Trusts	Retirement Plan Beneficiary Designation
Donor Advised Fund Distributions	Securities
IRA Qualified Charitable Distribution (QCD)	Tangible Personal Property
IRA Required Minimum Distribution (RMD)	Virtual Currencies
Life Insurance	

## An Invitation

Individuals who include a gift to any Catholic organization in the Diocese of Lansing in their will or estate plan are welcomed to participate in the Immaculate Conception Legacy Society. Monthly Mass is offered at St. Mary Cathedral for the intentions of members, living and deceased, and members are invited to a special Mass



and luncheon with Bishop Boyea on the Feast of the Immaculate Conception. Sharing the donor's gift intention will allow the diocese to show our appreciation and assure the donor's intentions are fulfilled as planned. Those who prefer to remain anonymous are also invited to be members of the legacy society.

All donations to The Catholic Foundation benefit programs and services offered within the Diocese of Lansing. A gift is used where the need is greatest at the time it is received, unless restricted to a specific purpose or endowment. Donors are encouraged to confirm their gift details in writing with the Foundation.

## Legal Name & Address

The Catholic Foundation of the Diocese of Lansing  
101 S. Washington Sq.  
Suite 620  
Lansing, MI 48933

## Federal Tax Identification / EIN Number

81-2025056

## Gifts Of Securities

Broker: Morgan Stanley, Perrone Lewis Group  
Contact: Stephen Perrone/Jennifer Edwards  
(517) 324-8008 or (800) 248-0487  
Account: 395-015775-043  
DTC #: 0015

Notify us prior to transferring securities in the Foundation's account or for assistance in transferring mutual fund shares.

## Beneficiary Designation Forms

Use the following address when completing a 'change of beneficiary' form for IRA, 401K, donor advised fund, Health Savings Account, life insurance policy or other financial account:

The Catholic Foundation of the Diocese of Lansing  
101 S. Washington Sq., Suite 620  
Lansing, MI 48933

## Qualified Charitable Distribution (QCD) from an IRA

Make checks payable to "The Catholic Foundation of the Diocese of Lansing" and include the account holder's name and "IRA Charitable Distribution" in the check memo.

For those donors 73 or older, a QCD may satisfy all or part of their required minimum distribution (RMD).

## Sample Bequest Language For A Will

There are many ways you can bequeath funds to The Catholic Foundation. Below are simple verbiage examples that can be considered for a will or trust.

### Specific Gift

"I give, devise, and bequeath to The Catholic Foundation of the Diocese of Lansing, a Michigan 501(c)(3) organization, the sum of \_\_\_\_\_ dollars (\$\_\_\_\_\_)."

### Specific Percentage

"I give, devise, and bequeath to The Catholic Foundation of the Diocese of Lansing, a Michigan 501(c)(3) organization, an amount equal to \_\_\_\_\_ percent ( \_\_\_\_\_%) of the value of my estate at the time of my death."

### Residual Bequest

"I give, devise, and bequeath all of the residual of my estate, both real and personal, to The Catholic Foundation of the Diocese of Lansing, a Michigan 501(c)(3) organization."

## Single Administrator

The Catholic Foundation serves as a unified administrator for donors wishing to allocate funds to multiple Catholic organizations within the Diocese of Lansing. By centralizing the donation process, donors can simplify their giving experience. Please contact the Foundation to establish a course of action for distributing funds to designated recipients when the gift is received.