



**Saint Francis de Sales Parish**  
**Parishioner Guide to Planned Giving**

A guide to planning your personal or family legacy with  
Saint Francis de Sales Parish

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Throughout this document, discover new opportunities to establish a legacy of generosity and faith with Saint Francis de Sales Parish.

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# About Saint Francis de Sales Parish

## Our Mission

We proclaim the Gospel of Jesus Christ in an urban setting to diverse members who form a Catholic community of believers of all ages.



# Planned Giving

*A planned gift helps you establish your personal or family legacy with Saint Francis de Sales Parish and extend your generosity into the future.*

In addition to the significant impact of a planned gift, these types of charitable donations often cost you nothing during your lifetime and offer you and your family a substantial tax savings.

Unlike cash donations, planned gifts are unique because they allow you to choose from a variety of giving options to help you achieve you or your family's philanthropic vision.

## **Did you know...**

A charitable bequest can reduce or, in some cases, eliminate federal estate or state inheritance taxes. For this reason, it is strongly encouraged that you discuss your plans with a certified tax accountant or personal attorney to maximize your tax savings!

# The Fund for De Sales

The Catholic Foundation of Greater Philadelphia (CFGF) is an independent, nonprofit organization committed to Catholic philanthropy in the Philadelphia area and beyond. They provide parishes, ministries, and Catholic organizations the tools and structure necessary to develop additional resources and support. That is why we created The Fund for De Sales with them.

We will be using The Fund for De Sales we have established with CFGF as our chosen vehicle for promoting and implementing planned giving. When you remember The Fund for De Sales in your estate plans, CFGF will make sure your gift is invested, professionally managed, and used for your specific intent – to benefit Saint Francis de Sales Parish.

# Your Charitable Goals

*Saint Francis de Sales Parish encourages you to consider why its mission is one that you or your family may want to choose for your charitable legacy.*

## **What are your charitable goals?**

### **1. Heritage**

By planning a future gift to The Fund for De Sales, you are contributing to a vibrant spiritual heritage that dates back to 1890.

### **2. Experience**

Your gift to The Fund for De Sales ensures that parishioners, guests, visitors, and community members continue to have the opportunity to experience the Sacraments on Springfield Ave.

### **3. Family**

Saint Francis de Sales Parish is a single family comprised of individual families like yours. Your gift will allow the parish to continue to be part of your family history and welcome new families to our home.

### **4. Legacy**

Your gift strengthens and preserves a unique and growing local legacy that reflects the history of the Saint Francis de Sales Parish community.

### **5. Faith**

Saint Francis de Sales Parish invites parishioners, guests, and community members to explore their personal relationship with God through the Sacramental life, the proclamation of the Word of God, and a life of charity.

### **6. Community**

Saint Francis de Sales parishioners are active volunteers in their communities and are involved in many programs designed to give back to those in need.

# Ways to Give

*The Fund for De Sales accepts a wide variety of planned gifts to help you or your family choose the best option to suit your interests, circumstances, and philanthropic goals.*

Wills and Bequests include long-term options that help you establish a personal or family charitable legacy, such as:

- Wills or living trusts, also known as bequests
- Specific, residual, or contingent bequests
- Gifts from IRA or other qualified retirement plans
- Life insurance

Direct Contributions include cash gifts that can be used by Saint Francis de Sales Parish immediately, including:

- Publicly traded securities (stocks, bonds, and mutual funds)
- Closely held stock
- Real estate

# Wills and Bequests

*A thoughtful bequest is generous and practical. It allows you to think through your decisions carefully and adjust your plans, as needed.*

A gift to The Fund for De Sales through your will can be a great way to increase your philanthropic impact without spending cash or securities up front.

## **Will or Living Trust**

Including The Fund for De Sales in your will allows you to support the parish programs and services that you are passionate about - in perpetuity - at no cost to you during your lifetime. Bequests are flexible, easy to get started, and fully revocable, meaning that you can adjust them at any time in case something changes.

## **Special Bequest**

A special bequest is made when you name a specific piece or property, dollar amount, or percentage of your estate to benefit The Fund for De Sales.

## **Residual Bequests**

A residual bequest refers to giving all or a portion of your remaining estate after any debts, taxes, expenses, or other beneficiaries have been paid.

## **Contingent Bequests**

In anticipation of some unexpected occurrence, a contingent bequest simply ensures that your property will go to The Fund for De Sales rather than to any unintended beneficiaries.

## **Gifts from IRA & other qualified retirement plans**

By naming The Fund for De Sales as a beneficiary of your IRA or other qualified retirement plan, you can balance your estate by leaving your highest taxed asset to a charity and your lowest taxed asset to your heirs. These gifts reduce the financial strain on your beneficiaries while allowing you to make a permanent charitable impact.



# Direct Contributions

*Saint Francis de Sales Parish gratefully accepts a variety of direct contributions to help you reach your philanthropic goals.*

These types of gifts are often donated at no cost but require some planning.

## **Stocks, bonds, & mutual funds**

If you or your family have held a stock, bond, or mutual fund for more than one year, these publicly traded securities can be transferred to The Fund for De Sales as a gift. A gift of securities allows you or your family to avoid the capital gains taxes that you would normally pay, while allowing you to deduct their value from your annual income tax. Stocks, bonds, and mutual funds can be cash wired, transferred electronically, or donated as a certificate.

## **Closely held stock**

If you hold stock in a closely held business (such as a majority shareholder), you may be able to donate this stock to support The Fund for De Sales. Like other types of securities, these gifts allow you to avoid the capital gains taxes on the shares you contribute and allow you to deduct their value from your federal income tax.

## **Real estate**

Do you own property that you no longer wish to manage or maintain? A gift of residential, commercial, or undeveloped real estate can offer a substantial tax savings for you and your family, while providing significant support to The Fund for De Sales. Please contact Mary Jo Rohrer, Relationship Manager at The Catholic Foundation of Greater Philadelphia, at 445-544-8558 or [mjrohrer@thecfgp.org](mailto:mjrohrer@thecfgp.org) to discuss your intentions and receive more information about gifts of real estate.

# Bishop Michael J. Crane Legacy Society

*The Bishop Michael J. Crane Legacy Society is part of our ongoing campaign to preserve our unique heritage.*

All of us want to leave a legacy – to continue to make a positive impact even after we are gone. The Bishop Michael J. Crane Legacy Society recognizes and acknowledges those who have included our parish and/or school in their estate plans or through a planned gift.

Faith is one of our greatest blessings. It adds meaning to our lives - and to the lives of so many others in profound ways. To help share and sustain your faith, we invite you to consider including The Fund for De Sales in your estate plan.

**Our planned giving donors play a vital role in helping Saint Francis de Sales Parish fulfill its Gospel mission of reaching out to others. Let us recognize your stewardship as a member of the Crane Legacy Society.**

Membership does not affect your current finances, but it does give us the opportunity to thank you.

## **You qualify for membership if you have:**

- Named The Fund for De Sales as a full or partial beneficiary of your will or living trust
- Designated The Fund for De Sales as a beneficiary of your insurance policy or transfer ownership of a paid policy
- Designated The Fund for De Sales as a beneficiary of your retirement plan or IRA

**Simply notify Mary Jo Rohrer, Relationship Manager at The Catholic Foundation of Greater Philadelphia, of your gift at 445-544-8558 or [mjrohrer@thecfgp.org](mailto:mjrohrer@thecfgp.org) to become a member.**

# Getting Started

*Planned giving is an easy, flexible, thoughtful, and profoundly personal process that anybody, no matter their circumstances, can get started.*

As you can see, there are many ways to start your personal or family legacy of giving with Saint Francis de Sales Parish. For example, including The Fund for De Sales in your will is as easy as including this sample language below to your existing will:

*"I hereby give, devise, and bequeath to The Fund for De Sales with The Catholic Foundation of Greater Philadelphia at 100 N. 20th Street, Suite 301, Philadelphia, PA 19103 (EIN 46-1566557) all, a fraction, or a percentage of the rest, residue, and remainder of my estate, both real or personal, to be used for its general purposes."*

Remember: Your contribution is much more than just a donation; it is an opportunity to participate in the future of a thriving church and local community, and for yourself or your family to be recognized and celebrated for your generosity and kindness.

Think of how many people your gift will affect? A planned gift, unlike a cash donation, increases that number exponentially.

## Ready to get started?

Estate planning should be done prayerfully and in conversation with your loved ones and a trusted advisor. If you need additional information on how to proceed with making The Fund for De Sales part of your plans, you can reach out to our expert partners at CFGP who will be happy to help:

### Mary Jo Rohrer

Relationship Manager

(445) 544-8558

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### Jody Romano

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### The Catholic Foundation of Greater Philadelphia Planned Giving Office

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**Saint Francis de Sales Parish**



**THE CATHOLIC  
FOUNDATION  
OF GREATER  
PHILADELPHIA**