

# WHY PLANNED GIVING?

Parishioners are able to ensure that the ministries they truly care about will continue to thrive.

## Gifts During Your Lifetime

### Gifts of Cash

Donations of cash can reduce income for tax purposes if you itemize deductions.

### Gifts of Securities

TCF will work with your brokerage firm to facilitate the sale of stocks, bonds, and mutual funds and send the proceeds to your parish.

### Qualified Charitable Distributions from an IRA, 401(k), or 403(b)

Once your retirement account distributions become mandatory you can have them paid directly to your church/organization, avoiding any potential income tax liability.

### Donor-Advised Funds

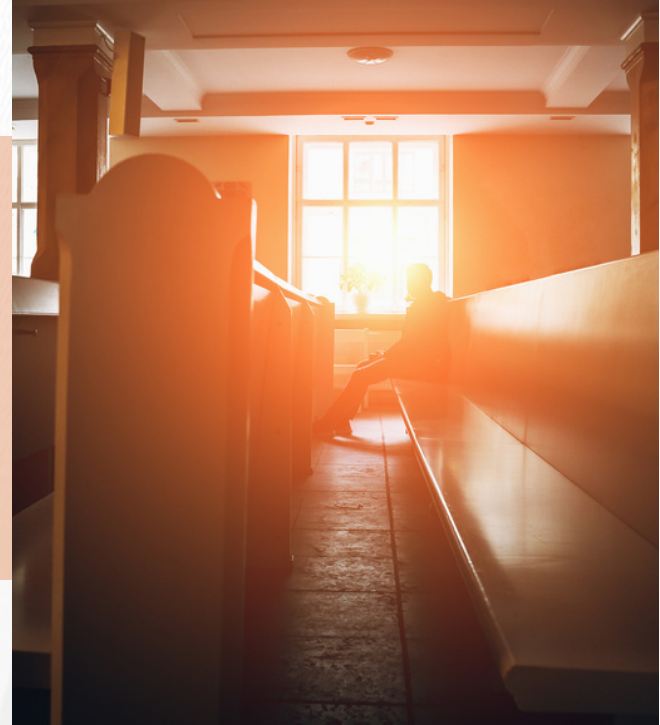
Set up a charitable fund that allows you to set aside your gift now. Decide in the years ahead which charities you would like to support.

### Charitable Gift Annuity (CGA)

Make a sizeable gift to your parish and receive a partial tax deduction and income stream for the rest of your life. Upon your death, the remainder of the gift goes to your parish.

### Other Gifts

- Real Estate
- Personal Property
- In-Kind Gifts



## Gifts Through Your Estate

### General Bequests

You can name a church/organization as a beneficiary in your:

- Will or Trust
- Financial Accounts
- Home with a beneficiary deed

### Retirement Accounts

- You can name your church as partial or complete beneficiary to your IRA or 401(k).
- This reduces the tax liability and frees other assets.

### Life Insurance Policies

- You can make your church partial or complete beneficiary.



## The Church Foundation

STRONG FOUNDATION. FAITHFUL INVESTING.

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