

1 **BEQUESTS, WILLS, AND TRUSTS** – The most common way to remember the Society of the Divine Savior is with a bequest made through one’s Will or other estate planning document. You may wish to leave a designated dollar amount, a specific property or account, or a percentage of your estate. Or you may elect to make a gift of “what’s left” after all other bequests have been satisfied. Please inform us if you have included the Society of the Divine Savior in your Will or other final estate plan.

Francis Jordan League –

Benefactors who let us know that they have remembered the Society of the Divine Savior in their Wills or other estate plans are immediately enrolled in our Perpetual Mass Association. They are assured a daily remembrance in the Masses and prayers of all Salvatorians, including a special Mass celebrated each day at our Salvatorian motherhouse in Rome.



2 **A GIFT OF LIFE INSURANCE** –

You can give a paid-up policy or even a policy on which you are still paying premiums by irrevocably designating Society of the Divine Savior as owner and beneficiary to receive all or a portion of the policy. And there may be tax advantages associated with such a gift as well.



3 **A GIFT OF PROPERTY** – You may choose to give a home, a farm, or vacation property to the Society of the Divine Savior, either as an outright gift or as a gift made through your estate plan. Such property may be used to fund a charitable gift annuity, too. With a life estate contract, you may deed property to the Society of the Divine Savior and still live in or otherwise make use of it for the remainder of your lifetime. You may also receive a current income tax deduction.



4 **A GIFT OF SECURITIES** – Do you own stocks, bonds, or mutual funds that have increased or decreased in value? Either way, they may offer an excellent way to help share in the work of the Salvatorians and offer generous charitable tax incentives. A gift of appreciated securities may also be used to fund a charitable gift annuity.

5 **IRAs AND MATCHING GIFTS** – Naming Society of the Divine Savior as a beneficiary of your IRA is a wonderful way to make the Salvatorians a part of your legacy. Even better, your IRA funds are never affected during your lifetime.

For those benefactors still in the workforce, you may wish to check with your employer to see if your company provides matching gifts to charitable organizations. If so, you may be able to double or even triple the amount of your gift to the Society of the Divine Savior!

6 **GIFT ANNUITIES** – When you make a gift to the Society of the Divine Savior through a charitable gift annuity, you secure a fixed income for life – for yourself and/or for another individual whom you designate. Because a charitable gift annuity entitles you to a charitable deduction in the year the gift annuity is established, it may also help to reduce the income taxes you pay. Moreover, a portion of the income you receive from your gift annuity will be tax-free. The Society of the Divine Savior follows the rates set forth by the American Council on Gift Annuities.

Please always be sure to consult your attorney or other tax professional before making a gift of real property.

7 **MEMORIAL GIFTS** – We all know special people who have brought joy to our lives. You may be looking for a way to give honor to these special individuals, whether they may be living or departed. And one way for you to show your love and your abiding respect for them is with a memorial gift to the Society of the Divine Savior.

A gift of cash or any of the plans of giving presented in this brochure may be appropriate for making a memorial gift. For further information, please contact our planned giving department.



Dear Fr. Gregory,

- I am considering including Society of the Divine Savior in my estate plan. Please send me additional information about leaving a charitable bequest or other planned gift.
- I have already included the Society of the Divine Savior in my will.
- Please send me your FREE booklet *“How to Make a Will That Works.”*
- I would like someone to contact me to answer my questions.

Name _____

Address _____

Email _____

Phone _____

- Please call me. The best time to reach me is:
- morning afternoon evening

Please be assured that there is no obligation and that all information about charitable gifts and bequests will be held in the strictest confidence.

