

## Become a Member

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Your membership helps The Catholic Foundation administer trusts at no cost to the trust's corpus or earnings. It is easy to become a member of the Catholic Foundation.

### We have several levels of membership:

- Lifetime \$5,000 (one-time)
- Majestic \$1,000
- Honorable \$500
- Guardian \$250
- Sustaining \$100
- Clergy / Religious \$25
- Friend \$25

Mr./Mrs., Mr., Mrs., Ms., Dr./Mrs., Drs.

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_

Work Phone \_\_\_\_\_

Email \_\_\_\_\_

Parish \_\_\_\_\_

Credit Card No. \_\_\_\_\_

Exp. Date \_\_\_\_\_  Visa  MasterCard

Signature \_\_\_\_\_

Name as it appears on the credit card

\_\_\_\_\_

Please make checks payable to:

**The Catholic Foundation**

All dues are tax deductible

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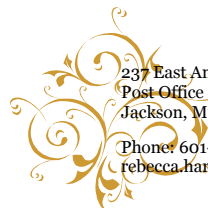
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Rebecca Harris, Executive Director  
Aad De Lange, Dir. of Administration and Finance  
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Cathy Eaves, Secretary



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**The  
Catholic  
Foundation**  
of the Diocese of  
Jackson, Inc.





# Blessed is the person who plants a tree so others may sit in its shade

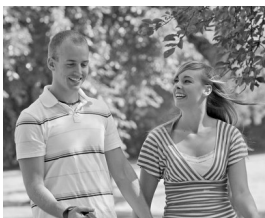
**The Catholic Foundation** is a nonprofit corporation which operates exclusively for the benefit of the Catholic Diocese of Jackson.

The Mission of The Catholic Foundation is to provide an ongoing source of revenue through trusts and legacy giving which financially supports the spiritual, educational and social needs of our Catholic community by:

- Assisting donors in establishing trusts and endowments for their parish, school, or other Catholic organization
- Receiving and administering gifts of cash, life insurance policies, and stock throughout the year
- Managing the investments of all funds
- Distributing earnings according to a donors intent
- Providing financial assistance to parishes, schools, and other ministries of the church through a grant program

Giving is a very important part of the life of a person devoted to Jesus Christ. Each year more and more Catholics are deciding to give a gift that perpetuates their Catholic faith.

Your gift is a way to express your gratitude to God for a lifetime of blessings. Your gift will establish a lasting legacy of love for others by enabling the Diocese of Jackson to continue to preserve and expand our Catholic heritage through our many ministries.



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## Where to Begin

We try to make it easy for you to make a legacy gift. First keep reminding yourself that you don't have to be wealthy to make a gift to the Catholic Foundation.



There are many ways that you can leave your legacy to the Catholic Foundation, your parish, school, or other Catholic organization within the Diocese of Jackson important to you.

**Trust** – establish a trust fund that provides your parish, school or other Catholic organization with a permanent source of funding.

**Add to an existing Trust** – make a gift in honor or memory of someone to an existing trust which benefits the Catholic Foundation, your parish, school or other Catholic organization.

**Charitable Gift Annuity** – establish a charitable gift annuity with the advantage of increasing your income while reducing your taxes. In exchange for your gift, you receive annuity payments for the rest of your life, or a fixed term of years.

**Bequest** – a bequest of any size can be left in your will to The Foundation. Sample language is “I hereby give, devise and bequeath to The Catholic Foundation of the Diocese of Jackson ...”



**Appreciated Securities** – make a gift of stocks, bonds or mutual funds that have appreciated. You will receive a tax deduction for the full market value at the time the gift is made.

**Depreciated Securities** – you can sell stocks, bonds or mutual funds that have depreciated in a down market and claim the loss on your tax return. Then donate the cash from the sale to The Foundation and receive a charitable deduction on your tax return for the amount of the gift.



**Life Insurance** – a gift of life insurance is a popular option when no longer needed for financial security. All you have to do is name the Catholic Foundation as owner and beneficiary of the policy and continue paying the premiums. You will receive a tax deduction for the cash value of your policy and an additional tax deduction for the premiums you pay in the future.

**IRA Rollover** – if you are 70.5 years of age or older, the Emergency Economic Stabilization Act of 2008 extends the opportunity to make direct rollover gifts from your IRA to the Church and avoid taxation. See your financial advisor for details.