

Begin Your Legacy

Your Gift and Benefits Received

Gifts that SVDP can use today

Outright:

- ❖ Current income tax deduction
- ❖ See gift in operation during your lifetime

Charitable Lead Trusts:

- ❖ Current income stream to SVDP
- ❖ Your heirs are future beneficiaries with potential gift tax savings

IRA Rollover Gifts:

- ❖ Up to \$100K of tax-free distribution from retirement account
- ❖ Easy way to make an annual gift for individuals 70 ½ years of age or older

Gifts that take effect after your lifetime

Bequests:

- ❖ Charitable deductions for taxable estates
- ❖ Allows you to make a large gift at no immediate cost to you

Life Insurance:

- ❖ Allows you to make a large gift at little or no cost to you

Retirement Plans:

- ❖ Avoid double taxation of retirement assets
- ❖ SVDP applies the full amount of plan assets to the purpose you choose

Retained Life Estate:

- ❖ Current income tax deduction
- ❖ Potential estate tax savings



Beneficiary Designations:

To make us a full or partial beneficiary of your IRA, 401(K), annuity or life insurance policy, simply request a beneficiary designation form from your plan administrator. Include the Society of St. Vincent DePaul ADCC as a beneficiary with our tax identification number – 36-3195567.

Bequest Sample Language for Wills and Trusts:

“I give (dollar amount/remainder of my estate/___% of the remainder of my estate/description of property) to the Society of St. Vincent DePaul Archdiocesan Council Chicago located at 12731 S. Wood St. Blue Island IL 60406, to be used in furtherance of its general purposes (or to be used exclusively for a specific program.)”

We recommend you speak with your accountant or estate planning attorney to make sure you receive the maximum benefits available to you and your situation

To leave a legacy of help and hope for people in need, please contact

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