

# CAMPAIGN GIVING OPPORTUNITIES

## Giving Opportunities for Good Shepherd Catholic Parish

There are a number of very special giving opportunities available to donors of qualifying gift amounts. These demonstrate what Good Shepherd Catholic Parish can do with various levels of gifts to our Honoring Our Traditions-Building Our Future campaign. They also allow the unique opportunity to dedicate a gift in honor or memory of a loved one.

### Church Renovation Opportunities

Church/Nave Improvements	\$ 1,000,000
New Level Floor Pew Seating	\$ 800,000
Sanctuary	\$ 700,000
Sanctuary Wall	\$ 300,000
Pew Section - North	\$ 200,000
Pew Section – North Center	\$ 200,000
Pew Section – South Center	\$ 200,000
Pew Section - South	\$ 200,000
New Back Seating Area	\$ 100,000
New Choir Area	\$ 50,000
New Updated Flooring	\$ 75,000
Optional ADA Seating/Choir Area	\$ 40,000
New Font Area	\$ 20,000
Audio/Visual	\$ 10,000
Lighting	\$ 10,000
Stone/Roof Maintenance	\$ 5,000
Pews (701)	\$ 2,500 ea.

### School Improvement Opportunities

Preschool & Pre-K Addition	\$ 1,400,000
Parking Lot Infrastructure	\$ 700,000
Classrooms (4)	\$ 25,000 ea.
Resource Room	\$ 10,000
Conference Room	\$ 10,000
Gazebo	\$ 5,000
Surplus Storage Facility	\$ 2,000

*The gift amounts listed are not necessarily reflective of the actual cost of the opportunity listed. Rather, they reflect approximate costs and factor in its value, visibility, and prominence as well as the needs of our campaign and gift abilities as a community. Recognition rights will be granted once payment is fully received.*

Donors of these opportunities will have their names and the names of those they are honoring commemorated in a special way, as will all campaign gift donors.

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### **If you have any questions or want more information, please contact:**

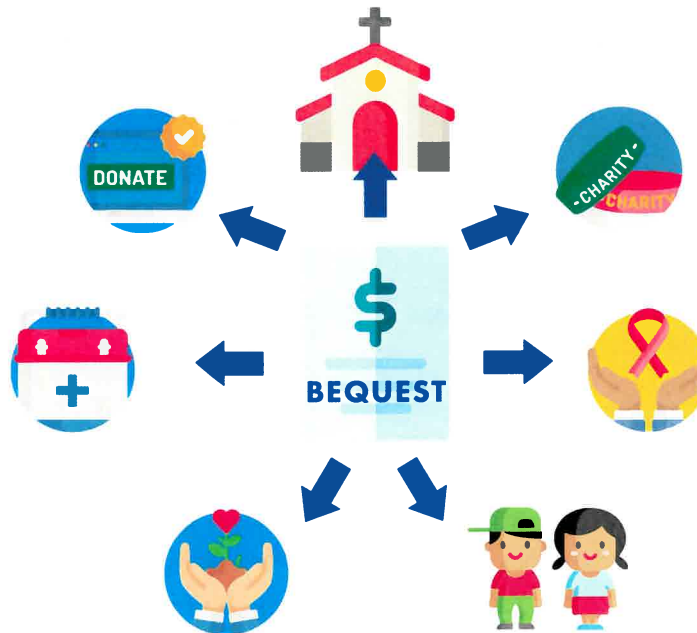
Ron Pohl, Creative Giving Chair for our Honoring Our Traditions– Building Our Future at Good Shepherd Catholic Parish.

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# GIFTS BY BEQUEST

## Making a Gifts by Bequest to Good Shepherd Catholic Parish



A simple, impactful, and popular way to leave a legacy is by making a gift by bequest to Good Shepherd Catholic Parish. This is especially true with gifts by bequest which most often recognize the people and institutions that mean the most to you.

### Common Bequests

- Recognizing Good Shepherd Catholic Parish in a will or trust.
- Naming the church as the Transfer on Death ownership of a bank account
- Designating other assets as a bequest, such as cash, stocks and bonds, personal property, real estate, and life insurance.

### Benefits of a Will Bequest

- Your will can direct a certain percentage of your entire estate, a fixed dollar amount, a specific asset, or the residual (remaining balance) go to the church as a gift.
- It can enable a large financial contribution in support of Good Shepherd Catholic Parish.
- It doesn't affect assets or cash flow during your lifetime. This also supports Good Shepherd Catholic Parish because a significant gift by bequest should not impact regular annual giving.
- Is flexible—you can change your bequest at any time you want or need.
- It reduces the taxable value of an estate for federal estate purposes and is exempt from state inheritance taxes.

## Basics of Preparing a Will

An estate lawyer offers the best advice in drafting a will. And, many people enjoy and benefit from working through this important and meaningful process with the support of an expert. However, there are reputable online programs and resources that can provide you value in this process.



1. **List your possessions and assets:** include all money, real estate, personal property, investments, insurance policies, bank accounts, jewelry, etc.
2. **Identify your beneficiaries:** list the people and organizations that mean the most to you and to whom you want to leave a gift.
3. **Divide your possessions:** consider your list and decide who will get what and how much. You can use percentages, specific amounts, or designate specific items.
4. **Select an executor:** choose a personal representative who will carry out your wishes. This can be a family member, friend, your bank, or personal advisor.
5. **Formalize your will:** consult your attorney to formalize your will (or use other reputable and thorough online resources).

## For Bequests Outside a Will

- **Retirement Accounts:** fill out a Change of Beneficiary form to identify Good Shepherd Catholic Parish as the full, partial, or contingent beneficiary of the account.
- **Bank Accounts:** add a Transfer on Death form to your account to include Good Shepherd Catholic Parish.

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## Example Bequest Language

Here is some basic bequest language to assist you and your attorney.

- **Bequest of a specific dollar amount:**  
“I hereby give, devise, and bequeath **\$Dollars** to Good Shepherd Catholic Parish, a non-profit organization located at 2301 N. Stockwell Rd., Evansville, IN, 47715. Federal Tax ID: Number 35-1073917, for Good Shepherd Catholic Parish general use and purposes.”
- **Bequest of specific personal property:**  
“I hereby give, devise, and bequeath **Description of Property** to Good Shepherd Catholic Parish, a non-profit organization located at 2301 N. Stockwell Rd., Evansville, IN, 47715, Federal Tax ID: Number 35-1073917, for Good Shepherd Catholic Parish general use and purposes.”
- **Bequest of specific real estate:**  
“I hereby give, devise, and bequeath all of the right, title, and interest in and to the real estate located at **Address or Description of Property** to Good Shepherd Catholic Parish, a non-profit organization located at 2301 N. Stockwell Rd., Evansville, IN, 47715, Federal Tax ID: Number 35-1073917, for Good Shepherd Catholic Parish general use and purposes.”
- **Bequest of a percentage of an estate:**  
“I hereby give, devise, and bequeath **Percentage of Your Estate** to Good Shepherd Catholic Parish a non-profit organization located at 2301 N. Stockwell Rd., Evansville, IN, 47715, Federal Tax ID: Number 35-1073917, for Good Shepherd Catholic Parish general use and purposes.”

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# GIFTS OF Life Insurance

## Making Gifts of Life Insurance to Good Shepherd Catholic Parish

Life insurance is a way to provide Good Shepherd Catholic Parish a large sum of money and leave a lasting legacy. This effective and convenient asset can be gifted outright or by naming Good Shepherd Catholic Parish as beneficiary. Each option has unique advantages for the giver and the church.

### Life Insurance Gift Options

#### Donating a Policy

A policy donation can provide a valuable benefit to both the donor and the charity. It often does not impede a donor's current investment strategy and can be a useful way to dispose of an unwanted policy originally purchased to cover a need that no longer exists.

#### Benefits

- Gifting a life insurance policy can greatly reduce the donor's taxable estate. This can save thousands of dollars in estate taxes for upper-income taxpayers.
- The charity receives the policy's entire face amount upon the death of the insured. This is usually going to be much more than they would receive from a life insurance rider, and can represent a substantial windfall for the charity.
- The cost to the donor is the policy premium paid. Any premiums paid after the date of the gift are deductible as well.
- There is no limit on the size of a policy that may be donated (since charitable donations have no ceiling for estate tax purposes).

#### Note

Life insurance policy gifts may be immediately sold by Good Shepherd Catholic Parish. This will result in the policy equaling its cash value at the time of surrender, not its death benefit amount.



#### Naming Good Shepherd Catholic Parish as Your Life Insurance Beneficiary

Naming Good Shepherd Catholic Parish as your life insurance policy beneficiary is the simplest way to provide it with the cash value of the policy's death benefit.



#### Benefits

- Naming the church as the policy beneficiary doesn't offer the income tax advantages to the donor that they get with gifting a policy, but it will reduce the donor's estate by the amount of the death benefit.
- Donors who aren't completely sure how they want to distribute their assets after death can list a charity as a revocable beneficiary. Doing this offers flexibility in case their financial situation changes in the future, for example, if the donor stops paying the policy premiums, the charitable organization can choose to continue the process or can allow the policy to lapse.
- Naming a charity as a life insurance beneficiary ensures the transaction remains private. This can be important for donors who wish to keep their gifting intentions secret from their families or other heirs. The transfer of assets from an insurance contract cannot be contested, making it impossible for anyone to stop the donation from occurring.

## Charitable Gift Riders

A life insurance rider tailors insurance coverage to meet a policyholder's needs by adding benefits to or amending a basic insurance policy to provide additional coverage. Charitable giving is just one type of rider available for life insurance policies.

For example, a rider can be attached to a policy to pay a specific percentage of the policy's face value to a qualified charity of the policyholder's choice.

Donors should consider the use of charitable riders on their cash value insurance policies to provide at least a small gift if possible.

### Benefits

- Riders usually come at no additional cost and often do not reduce the cash value or the death benefit of a life insurance policy.
- Using one can effectively eliminate the need to create, pay for, and administrate separate gift trusts until the death of the insured.
- Once a rider has been added to a life insurance policy, no further action is needed by the policyholder.
- These riders do have a few limitations, including the high amount of protection that must be purchased to use them and there sometimes can be limitations on the maximum allowable gift amount.
- Any charity chosen must be a qualified 501(c)(3) charity that meets the Internal Revenue Service (IRS) definition of a nonprofit organization. Make sure the charity you wish to support will accept your life insurance policy. Some types of policies, such as term policies are shunned by these organizations.

## Gifting Policy Dividends

Policyholders can receive their life insurance policies dividends in cash and donate them to Good Shepherd Catholic Parish . Although doing this does not provide the same amount of benefit to a charity as the other strategies discussed, the donated dividends are deductible in the same manner as premiums paid on a gifted policy, and this strategy does not require any additional cash outlay from the donor.



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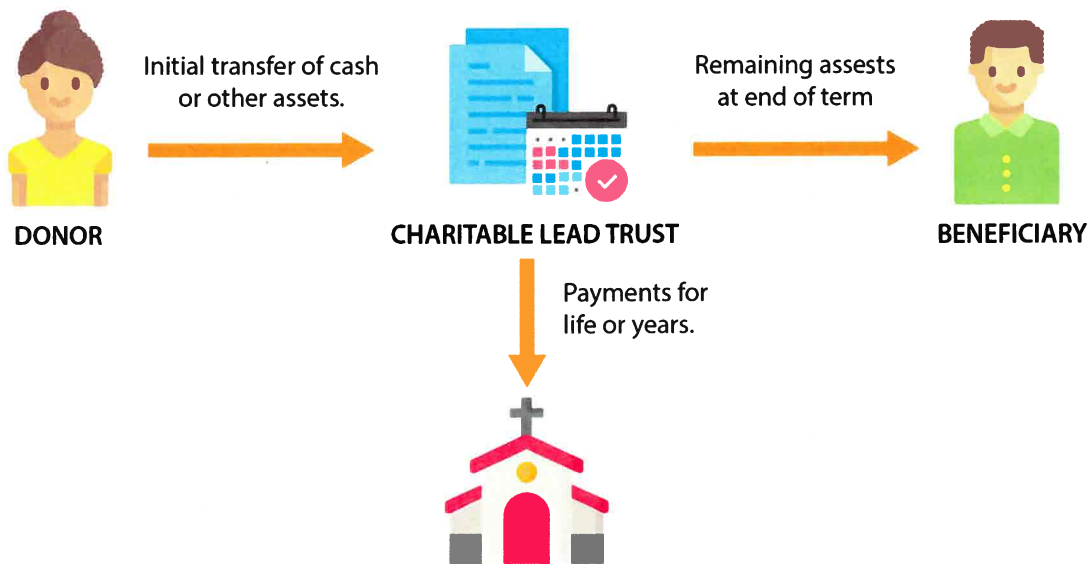
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# Charitable Lead Trust

## Making a Charitable Lead Trust Gift to Good Shepherd Catholic Parish

A Charitable Lead Trust (CLT) allows a donor to make a significant gift to Good Shepherd Catholic Parish, minimize estate taxes, and pass assets on to non-charitable beneficiaries such as family members. The CLT works by first using the contributed trust assets to make annual payments to the church for a set number of years (usually 10 to 20). At the end of that time, the trust's remaining assets pass to the non-charitable beneficiaries, without passing through the donor's estate. Thus, the lead trust is a technique for giving a "temporary gift" of income.



## How a CLT Works

1. The donor makes a contribution to fund the trust which is set up for a fixed term such as a set number of years or the life of one or more people. Cash and other assets such as publicly traded stock, real estate, private business interests and private company stock can be contributed. Each offers different tax treatment and considerations.
2. Payments from the trust are disbursed to the selected charity or charities as either a fixed annuity payment or a percentage of the trust.
3. At the end of the term, the remaining assets are distributed to the beneficiaries, often family members in a manner that can minimize or even eliminate transfer taxes.

## CLTs Versus CRTs

### Trust Strategies

Charitable Lead Trusts are often considered the inverse of a Charitable Remainder Trust (CRT). A CLT has a set term, often the life of the donor, during which payments are made to the designated charity. After the end of the term, the trust's remainder is distributed to non-charity, often family, beneficiaries. A CRT, in contrast, provides a stream of income for family members during the trust's term with the remaining assets transferred to the charity after that ends.

For more information see our Charitable Remainder Trust handout.

CLTs, like CRTs, are usually complicated and subject to specific IRS rules. Anyone considering establishing a charitable lead trust, should consult with their legal and tax advisors.

## Benefits

- A CLT is a strategy most frequently used for estate or gift tax planning purposes. It is an excellent way to transfer property to family members down the line (typically children and grandchildren) at a minimal tax cost.
- A CLT (also called a non-grantor, or family lead, trust) is especially appealing to those who are financially comfortable enough to forgo investment income on some assets.
- A CLT can be funded either during the lifetime of the individual creating the trust or through a will. It potentially can provide income tax deductions or estate or gift tax savings on assets ultimately passed to the individuals designated as remainder beneficiaries. At the same time, the trust distributes regular payments to benefit a preferred charity or charities during the term of the trust.
- A CLT can be set up as to provide the charity a specified annuity or standard amount from the trust each year or as a unitrust or percentage of the trust assets each year. The choice of annuity vs. unitrust payments may have implications for the value of the remaining assets at the end of the trust term.

## Types of CLTs

There are two types of charitable lead trust that affect tax treatment—grantor and non-grantor trusts. Tax planning and other goals of the individual establishing the trust should guide the choice between these categories, as each provides distinct advantages and possible drawbacks.

Notably, both grantor and non-grantor trusts can be structured to be “reversionary,” meaning that the remainder assets revert to the individual(s) establishing the trust or “non-reversionary,” meaning that the remainder assets will be distributed to a beneficiary other than the originators. These choices will have additional impact on tax treatment.



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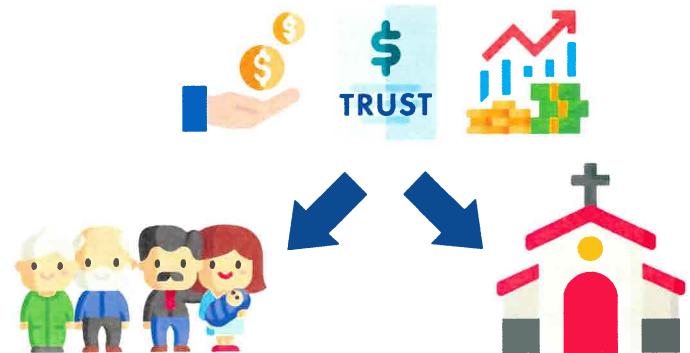
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# CHARITABLE REMAINDER TRUSTS (CRT)

## Making Life Income Plan Gifts to Good Shepherd Catholic Parish

A Charitable Remainder Trust (CRT) is a tax-exempt irrevocable trust designed to reduce a person's taxable income by first dispersing income to the trust beneficiaries (you or a loved one) and eventually donating the remainder of the trust to a designated charity such as Good Shepherd Catholic Parish.

Common assets used in CRTs include cash, stocks or non-publicly traded assets such as real estate, private business interests, and private company stock.



Catholic Parish without a capital gains tax impact on you.

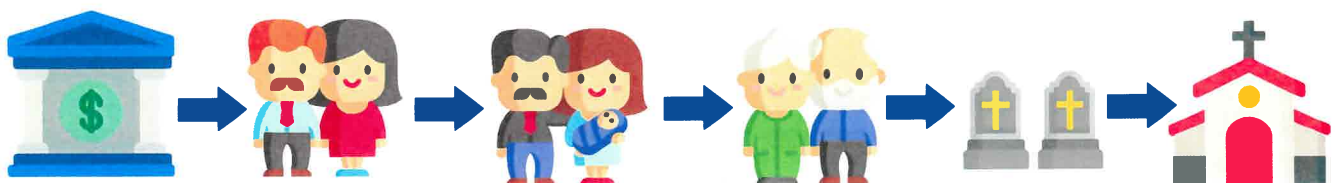
### Benefits

- Immediate income charitable deduction on taxes at the time the gift to the church is contributed to the trust. The charitable deduction is based on the gift's market value when it is contributed without triggering taxable capital gains.
- You can leave a legacy in support of Good Shepherd Catholic Parish without current loss of income.
- Potential increase in lifetime income by funding the trust with low dividend yielding stocks.
- Tax savings for those with increased cash flow from recently sold property.
- Federal estate tax deduction.
- If the asset has greatly increased in value, it can have an important impact on Good Shepherd

### Two Types of CRTs

- **Charitable Remainder Annuity Trusts (CRAT)** provides income as a fixed dollar amount each year. You are not allowed to make additional contributions to the trust once it is established.
- **Charitable Remainder Unitrust (CRUT)** provides income as a fixed percentage amount based on the balance of the trusts assets, which are revalued annually. Additional contributions can be added to the trust after it is created.

**As always, please consult with your financial advisor before entering into a gift arrangement.**





## Basics of Establishing a CRT

1. Transfer the cash or assets you want to fund the trust. Then transfer the trust to a trustee who will be in charge of managing or investing it.
2. If appropriate (due to appreciated assets), the trust will then sell assets tax-free.
3. The trust is invested and creates income for you or your loved one for life or a predetermined number of years.
4. You receive an immediate tax deduction in the year of your transfer to initiate the trust.
5. After all trust payments have been made, Good Shepherd Catholic Parish benefits with the remainder.

**NOTE:** Create the CRT with the guidance of an experienced legal professional.

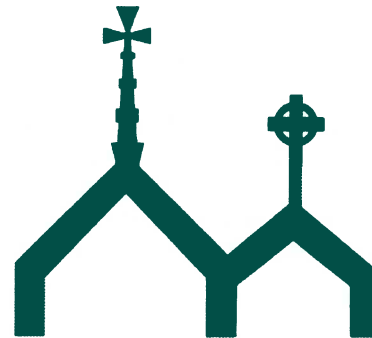
*“A generous man will prosper;  
he who refreshed others  
will himself be refreshed.”*

Proverbs 11:25

## Other Similar Options to a CRT

- Charitable Gift Annuities
- Wealth Replacement Trusts
- Charitable Lead Trusts

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**Honoring Our Traditions  
Building Our Future**

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# GIFTS OF REAL ESTATE

## Making Gifts of Real Estate to Gifts to Good Shepherd Catholic Parish

Real estate can make a wonderful gift to our campaign and church. These gifts can include a home, vacation property, undeveloped land, farmland, ranch, or commercial property as an outright gift or a retained life estate. All real estate gifts are subject to approval by Good Shepherd Catholic Parish.

### Real Estate Gift Options

#### Outright Gift of Real Estate

Giving Good Shepherd Catholic Parish a home, commercial or vacation property, or any type of land can be a very beneficial way for you to give to our campaign for the benefit of our church.

#### How to Make This Gift

Your gift of real estate may be given by executing or signing a deed transferring ownership to Good Shepherd Catholic Parish. Your gift generally will be based on the property's fair market value, which must be established by an independent qualified appraisal before the transaction.

#### Benefits

- Avoid paying capital gains tax on the sale of the real estate.
- Receive a charitable income tax deduction based on the value of the gift.



#### Retained Life Estate Provision

##### How to Make This Gift

To gift a real estate gift with a retained life estate, you deed your home or farm to Good Shepherd Catholic Parish. The deed will include a provision that gives you the right to use your home or farm for the rest of your life and that of any other life estate party named in the deed.

You and Good Shepherd Catholic Parish also sign a maintenance, insurance, and taxes (MIT) agreement to confirm that you will do your best to keep the property in good condition, that you will maintain property insurance, and that you will pay the property taxes.

When the life tenant(s) of the life estate have passed away, your home or farm will belong to Good Shepherd Catholic Parish outright.



#### Benefits

- Receive a federal income tax deduction for the value of the remainder interest in the home or farm.
- Preserve the use and control of the home or farm during their lifetime
- You can create the life estate based on more than one life. This option preserves the use of the property for yourself and a loved one, such as a spouse or dependent child.

#### NOTE

You, as the life tenant(s) of the life estate, will be responsible for the property maintenance, insurance and taxes, just as you were prior to creating the life estate.

## Bargain Sale Strategy

You can give real estate by selling your property to Good Shepherd Catholic Parish for less than its fair market value. For example, if you sell us property for \$50,000 that is worth \$100,000, you will receive a federal income tax charitable deduction of \$50,000 plus the sale price of \$50,000 from us.

Note: If the federal income tax charitable deduction claimed for a gift of real estate exceeds \$5,000, you must obtain an appraisal from a qualified appraiser and submit a special IRS form with the tax return on which the deduction is claimed.

## How to Make This Gift

To gift a real estate gift with a retained life estate, you deed your home or farm to Good Shepherd Catholic Parish. The deed will include a provision that gives you the right to use your home or farm for the rest of your life and that of any other life estate party named in the deed.

You and Good Shepherd Catholic Parish also sign a maintenance, insurance, and taxes (MIT) agreement to confirm that you will do your best to keep the property in good condition, that you will maintain property insurance, and that you will pay the property taxes.

When the owners of the life estate have passed away, your home or farm will belong to Good Shepherd Catholic Parish outright.

## Benefits

- Avoid capital gains tax on your charitable gift.
- Receive a tax deduction that will reduce your tax bill for the current year.
- Take the cash received from a bargain sale and reinvest it to create future income, create future savings, buy new property or achieve other financial and/or charitable goal
- Give new life to unused property that will be of value to Good Shepherd Catholic Parish.



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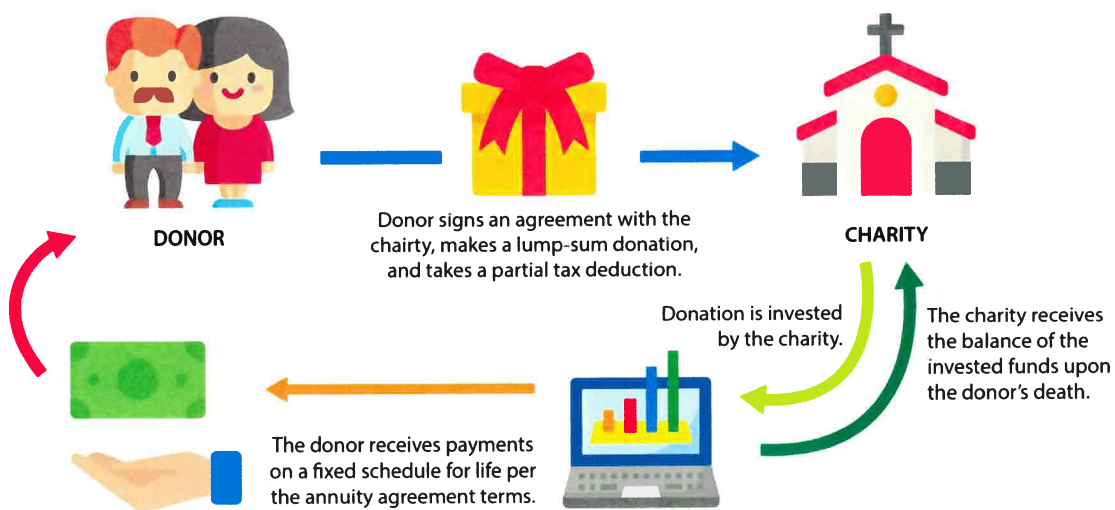
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# Charitable Gift Annuity

## Making a Gift Through a Charitable Gift Annuity to Good Shepherd Catholic Parish

A charitable gift annuity is a contract between a donor and a charity where you as the donor makes a sizable gift of cash, securities, or possibly other assets to Good Shepherd Catholic Parish . In return, you become eligible to take a partial tax deduction for your donation, plus you receive a fixed income stream from Good Shepherd Catholic Parish for the rest of your life.



### How a Charitable Gift Annuity Works

1. An individual or couple (the annuitant/s) make a donation to Good Shepherd Catholic Parish in exchange for a lifelong annuity contract. The terms lock in the rate, amount, and timing of the payments you will receive.
2. The gift is set aside in a reserve account and invested. Based on your age(s) at the time of the gift, you receive a fixed monthly or quarterly payout (typically supported by the investment account) for the rest of your life/lives.
3. At the end of your life/lives the charity receives the remainder of the gift.

### Types of Charitable Gift Annuities

#### Current

You may transfer cash or property in exchange for Good Shepherd Catholic Parish promise to pay you fixed payments beginning as early as this year. You receive an income tax charitable deduction for the value of your gift.

#### Deferred

Sometimes annuitant/s elect not to receive payments immediately but wait for a specific future event (i.e., retirement) or to receive a higher payout percentage if income is not needed now. A deferred gift annuity, establishes the annuity now for the charitable income tax deduction this year, but defers the payments until a designated date sometime in the future.

#### Flexible

A flexible deferred gift annuity allows the annuitant to choose when they will start to receive payments. The annuity is established for the charitable deduction this year, but the payments are deferred until you elect to begin receiving payments.

## Benefits

- Income stream for the rest of your life.
- Immediate (partial) tax deduction, based on your life expectancy and the anticipated income stream.
- Potential for a portion of the income stream to be tax-free.
- Possibility of donating many types of assets: cash, securities plus personal property.
- Reduced or eliminated capital gains tax liability for gifts of appreciated securities and personal property.
- The annual payment is backed by the charity's entire assets, not just your gift, so it is guaranteed to continue for the lives of the donors no matter how well or poorly the annuity investments perform.
- Supporting an organization you care about.



## Limitations

- Parting irrevocably with funds donated to create the annuity.
- Subject to income tax on the income stream (payments from the annuity).
- Payments are fixed and won't be adjusted for inflation.
- Payments may be lower than with a non-charitable annuity because the primary purpose is for non-profit support.
- Cannot be used to support multiple charities unless you set up multiple annuities.



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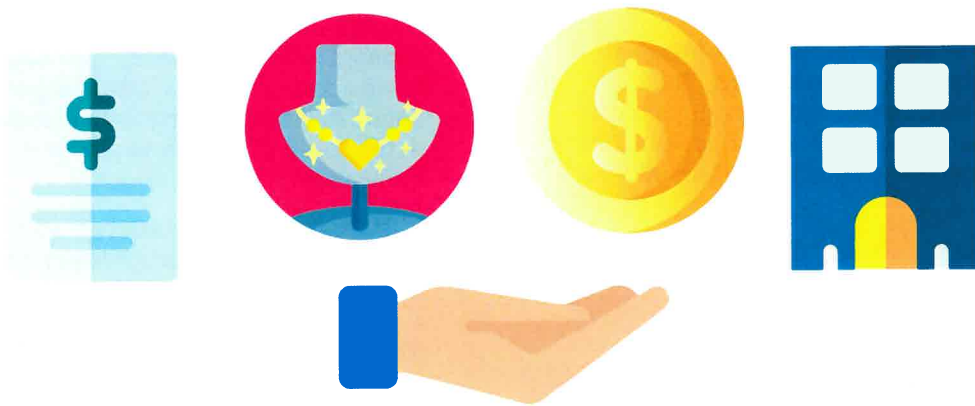
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# GIFTS OF Personal Property

## Making a Gifts of Personal Property to Good Shepherd Catholic Parish

Your treasures of valuable antiques, stamp and coin collections, works of art, cars, boats, or other personal property can be beneficial charitable gifts to Good Shepherd Catholic Parish. Gifts of personal property can be given today or set up to be given after your lifetime. Most gifts of personal property must be approved by Good Shepherd Catholic Parish before it will be accepted, so be sure to consult them before making your gift.



## Ways to Gift Personal Property

### Outright Gift

Directly gifting personal property allows Good Shepherd Catholic Parish to benefit from the donation today and you to receive a federal income tax charitable deduction if you itemize. Valuable gifts of jewelry, property, artwork, etc. can be retained or sold with the proceeds immediately making a financial impact.



### In Your Will or Living Trust

You can leave a legacy to Good Shepherd Catholic Parish by

donating property to us through your will or living trust to be received upon death.

### Bargain Sale

Selling Good Shepherd Catholic Parish your property for less than its fair market value is a Bargain Sale strategy. For example, if you sell Good Shepherd Catholic Parish an antique for half its \$5,000 value, they will pay you \$2,500 plus you will receive a federal income tax charitable deduction of \$2,500.

### Benefits

- Avoid capital gains tax on your charitable gift
- Receive a tax deduction that will reduce your tax bill in the current year
- Take the cash received from a bargain sale and reinvest it to create future income, create future savings, buy new property or achieve other financial and/or charitable goals

- Give new life to unused property that would be of value to Good Shepherd Catholic Parish .

## **Other Potential Personal Property Gifting Options**

### **Charitable Gift Annuity**

You can sometimes use non-income producing property such as valuable stamp and coin collections or works of art in exchange for life payments and a federal income tax charitable deduction. The amount of the charitable deduction depends, in part, on whether the donated items are retained by the charity and used for its tax-exempt purpose.

For more information, see our Charitable Gift Annuity handout.

### **Charitable Remainder Trust (CRT)**

You may be able to contribute tangible personal property to a charitable remainder trust. A CRT provides tax benefits to the creator, income to trust beneficiaries, and eventually donates the remainder of the trust to a designated charity such as Good Shepherd Catholic Parish .

For more information, see our Charitable Remainder Trust handout.

### **Donor Advised Fund**

Gifts to donor advised funds are not limited to cash and securities. Tangible personal property such as valuable

antiques, stamp and coin collections, art, cars, and boats may be able to be gifted and sold to benefit your fund.

### **Cryptocurrency**

Cryptocurrency is another asset that may be used to make a difference at your church. Cryptocurrency is a digital asset that can be traded in a similar way to securities. It can be used to fund Donor Advised Funds or donated outright. When donated outright, it functions more like personal property. Please contact Good Shepherd Catholic Parish if you would like to pursue this opportunity.

### **Note**

- Related-use property—e.g., a piece of artwork donated to an art museum—is deductible at the full fair market value. Any other property is deemed nonrelated-use property with a deduction limited to the lesser of fair market value or your tax basis in the property.
- If the federal income tax charitable deduction claimed for a gift of tangible personal property exceeds \$5,000, you must obtain an appraisal from a qualified appraiser and submit a special IRS form with the tax return on which the deduction is claimed.



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# GIFTS BY QUALIFIED RETIREMENT FUNDS

## Making Qualified Charitable Distribution (QCD)/ IRA Charitable Rollover Gifts to Good Shepherd Catholic Parish

If you are looking for a way to make a big difference to Honoring Our Traditions-Building Our Future campaign, an IRA Charitable Rollover can be used to make or fulfill your pledge. And, if you are of an eligible age, it also may be a way to lower your IRA withdrawal income and taxes.



### Benefits

- Avoid taxes on transfers of up to \$100,000 from your IRA to Good Shepherd Catholic Parish .
- Satisfy your required minimum distribution (RMD) for the year.
- Reduce your taxable income, even if you do not itemize deductions.
- Make a gift that is not subject to the 50% deduction limits on charitable gifts.
- Help towards achieving the goals of our Honoring Our Traditions-Building Our Future campaign.

**As always, please consult with your financial advisor before entering into a gift arrangement.**

*Do not be afraid, little flock, for your father has been pleased to give you the kingdom. Sell your possessions and give to the poor. Provide purses for yourselves that will not wear out, a treasure in heaven that will not be exhausted, where no thief comes near and no moss destroys. For where your treasure is, there your heart will be also.*

Luke 12:32- 34

### How to Make an IRA Charitable Rollover

1. Contact your IRA plan administrator to make a gift from your IRA to Good Shepherd Catholic Parish . Please request that your name and the Honoring Our Traditions-Building Our Future campaign designation be included with the transfer information, so we are able to thank you for your gift.
2. Your IRA funds will be *directly* transferred to Good Shepherd Catholic Parish for the Honoring Our Traditions-Building Our Future campaign. Be sure the rollover is made to the church name, NOT to you personally.
3. Note that IRA charitable rollover gifts do not qualify for a charitable deduction on taxes.

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**As always, please consult with your financial advisor before entering into a gift arrangement.**

Good Shepherd Catholic Parish is a not-for-profit charitable 501(c)(3) organization. All contributions are tax deductible within the limits of the law.

**If you have any questions or want more information, please contact:**

Ron Pohl, Creative Giving Chair for our Honoring Our Traditions– Building Our Future at Good Shepherd Catholic Parish.

Email: [ron@rjpohl.com](mailto:ron@rjpohl.com)

Phone: (812) 205-5973

# GIFTS OF STOCKS OR SECURITIES

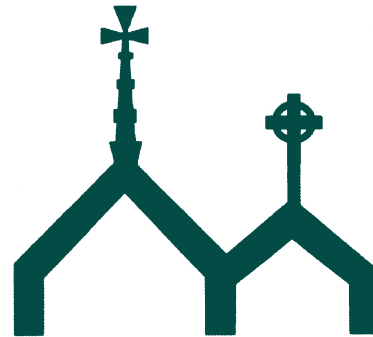
## Making Stock or Security Gifts to Good Shepherd Catholic Parish

Making a charitable gift of stock or securities can be an easy and tax-effective way for you to make an impact on Good Shepherd Catholic Parish through our Honoring Our Traditions-Building Our Future campaign. Your campaign pledge can be made or fulfilled in this popular, convenient, and economical way.

You can donate any publicly traded stocks, mutual funds, Treasury bills and notes, corporate and municipal bonds, or stock in non-publicly held companies.

### Benefits

- A potential Income Tax Charitable Deduction for the full market value of the securities at the time you make the donation.
- Generally, if the asset has increased in value, donating the stock or security directly to the church increases the amount of your gift as well as your tax deduction.
- In most cases, if the asset has decreased in value since you purchased it, it is best to sell it, take the capital loss for tax purposes, and then donate the cash.
- Potentially avoiding capital gains tax on the appreciated portion of the stock if it were sold.
- Having an important impact on achieving our campaign goals and plans for Good Shepherd Catholic Parish.



### Honoring Our Traditions Building Our Future

### Gift Valuation

- For publicly traded securities, the value of the gift is the average of the high and low on the date of the gift.
- Mutual Fund shares are valued using the closing price on the date of the gift.

**As always, please consult with your financial advisor before entering into a gift arrangement.**

*“But who am I, and who are my people,  
that we should be able to give as generously as this?  
Everything comes from you, and we have given you  
only what comes from your hand.”*

1 Chronicles 29:14-16

## How to Give Stock

If you hold the certificates on the stock, you can direct the company to reissue some shares in the name of Good Shepherd Catholic Parish.

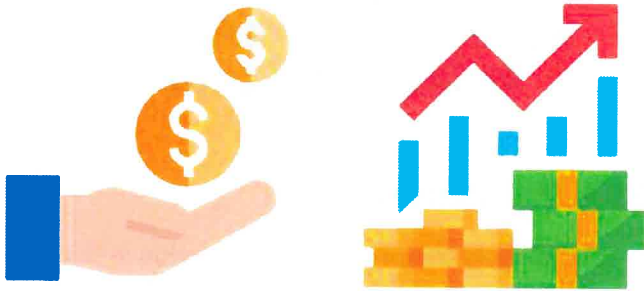
If your broker holds the certificates, you must send your broker a letter signed by you (and your spouse if held jointly) indicating how many shares you wish to transfer to Good Shepherd Catholic Parish by either:

- Issuing a new certificate to Good Shepherd Catholic Parish

OR

- Transferring shares electronically (please notify Beth Campbell at 812-477-5405)

Either way you will need to include Good Shepherd Catholic Parish Federal Tax ID#: 35-1073917



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### If you have any questions or want more information, please contact:

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Email: [ron@rjpohl.com](mailto:ron@rjpohl.com)

Phone: (812) 205-5973

## How to Make a Stock Transfer

- For stock held in brokerage accounts, your financial advisor or trust officer can assist you in making a gift of stock via a direct transfer to Good Shepherd Catholic Parish.
- Not all mutual funds transfer through our DTC number. For these and gifts of stock not held in a brokerage account, please contact our campaign office for details.
- Also, please notify our campaign office of all stock transfers so we can confirm them.

## Church Transfer Information

Broker: **Name**

Account Name: **Name**

Account #: **Number**

DTC: **Name**

Federal Tax ID#: **35-1073917**

Financial Advisor: **Name**

Phone: **Number**

