

## YOUR CHARITABLE BEQUEST

Your charitable bequest is a most important type of gift for Catholic Charities of the Diocese of Santa Rosa. When received, your bequest will be entered into our books and records as a gift that helps sustain our mission, serving the objectives and purposes of Catholic Charities

There are three types of bequests for you to consider. The first, residual, is most flexible because it allows your gift to appreciate in your will no matter what asset is used. Residual bequests are often made after remembering relatives and friends. A specific bequest of an asset such as a retirement plan results in no income taxes paid on the plan by your estate. When you place any of these first two types of bequest in your will or living trust and notify Catholic Charities, we will invite you to become a member of Legacy Society.

### *Residual:*

“I give, devise and bequeath to Catholic Charities of the Diocese of Santa Rosa, a nonprofit corporation of the State of California, tax ID #94-2479393, located at 987 Airway Court, Santa Rosa, California 95403, all the residue of my estate, including real personal property.” or “ ... \_\_\_% of my estate.”

### *Specific:*

“I give, devise and bequeath to Catholic Charities of the Diocese of Santa Rosa, a nonprofit corporation of the State of California, tax ID #94-2479393, located at 987 Airway Court, Santa Rosa, California 95403,

Choose one:

- 1) The sum of \$\_\_\_\_\_.”
- 2) \_\_\_\_\_ shares of stock in \_\_\_\_\_ Company.” , or
- 3) my real property commonly known as \_\_\_\_\_.”

### *Contingent:*

“In the event of the death of any of the beneficiaries, I give, devise and bequeath to Catholic Charities of the Diocese of Santa Rosa, a nonprofit corporation of the State of California, tax ID #94-2479393, located at 987 Airway Court, Santa Rosa, California 95403, (percentage, specific, or residual language as above).”

**FR. STEPHEN CANNY LEGACY CIRCLE**