

Planned Giving at St. Henry Church

Bequest

There are many benefits if you leave a bequest to St. Henry Church:

What is a Bequest?

A bequest is a written statement in a donor's will, directing that specific assets, or a percentage of the estate, will be transferred to charity upon the donor's death. Giving through your will is the most popular way to make an estate gift and one of the most significant ways donors can benefit St. Henry Church. Through a provision in your written and executed will, you can make a gift in the form of cash, securities, real estate, or personal property.

- It doesn't cost you anything today
- a bequest is free of federal and estate tax
- You can leave a legacy through a bequest

Consider this sample language:

I add the following paragraph to Article _____ of my Last Will:

- (a) I give the following to St. Henry Church, Nashville, TN, an unincorporated religious association the sum of \$_____ [amount] AND/OR _____% [percent] of the residue of my estate AND/OR The following described property: [description].

Retirement Plans and IRA's

This gifting opportunity merely involves obtaining a beneficiary designation form from the retirement plan administrator of a 401(k), 403(b), or traditional IRA and naming St. Henry Church as the entire or partial beneficiary of the retirement plan assets upon the owner's death.

Life Insurance

Donors may give an existing policy, either fully paid or partially paid, or a new policy. Similar to a retirement plan designation, the proposed gift to St. Henry Church is accomplished by naming St. Henry Church as a beneficiary of the policy on the beneficiary designation form. Upon the donor's death, St. Henry Church will receive all, or a portion of, the proceeds from the policy.

If you would like more information on how to make a Bequest or help in Planned Giving, please contact our Director of Finance, Martha Aus at maus@sthenry.org.