



## CATHOLIC LEGACY SOCIETY

# St. Charles Borromeo Catholic Church

513 Colorado Avenue

Stratton, CO 80836

(719) 348-5336 Fax (719) 348-4601

Mailing Address: P. O. Box 266, Stratton, CO 80836

## SAMPLE BEQUEST LANGUAGE

A gift to St. Charles Borromeo Catholic Church in your will or revocable trust proclaims your confidence that we will continue to fulfill our mission and make a difference in the lives of future generations. A bequest:

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

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**RESIDUAL BEQUEST:** A residual bequest comes to us after your estate expenses and specific bequests are paid:

*I give and devise to St. Charles Borromeo Catholic Church, located in Stratton, Colorado, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its unrestricted use (or for the support of the St. Charles Borromeo Parish Endowment Fund held by the Catholic Foundation of the Diocese of Colorado Springs).*

**SPECIFIC BEQUEST:** Naming St. Charles Borromeo Catholic Church as a beneficiary of a specific amount from your estate is easy:

*I give and devise to St. Charles Borromeo Catholic Church, located in Stratton, Colorado, the sum of \$\_\_\_\_\_ to be used for its unrestricted use (or for the support of the St. Charles Borromeo Parish Endowment Fund held by the Catholic Foundation of the Diocese of Colorado Springs).*

**CONTINGENT BEQUEST:** St. Charles Borromeo Catholic Church can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

*If (insert name) is not living at the time of my demise, I give and devise to St. Charles Borromeo Catholic Church, the sum of \$\_\_\_\_\_ (or all or a percentage of the residue of my estate) to be used for its unrestricted use (or for the support of the St. Charles Borromeo Parish Endowment Fund held by the Catholic Foundation of the Diocese of Colorado Springs).*

**RETIREMENT PLAN:** You may name St. Charles Borromeo Catholic Church as a beneficiary of your IRA or other qualified retirement benefits. To make a charitable gift from your retirement plan, simply enter the St. Charles Borromeo Catholic Church name and Federal Tax ID #84-0404920 on the Change of Beneficiary Form, available from your plan administrator. Consult with your advisor to determine the benefits you would derive from such a gift.

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**FOR FURTHER INFORMATION:** We would be pleased to work with you and your advisor to determine the gift that best suits your situation and interests. For confidential information on how to create a legacy gift or for additional information on enrollment in the *Catholic Legacy Society*, please contact Jamie Crane, Planned Giving Officer, at (719) 866-6518 or [jcrane@diocs.org](mailto:jcrane@diocs.org). Visit our website at [www.diocsGiftLegacy.org](http://www.diocsGiftLegacy.org).

*Neither the Diocese of Colorado Springs nor its parishes are engaged in rendering legal or tax advisory services. The above language is intended solely for general information purposes. For advice and assistance in specific cases, legal counsel should be obtained.*