

WE INVITE YOU TO ALIGN
YOUR LEGACY WITH OURS...

Learn more about the Legacy Society.
Simply fill out the form, mail it back
to us or drop it in the collection basket.



I'D LIKE TO LEARN MORE
ABOUT THE LEGACY SOCIETY.

NAME: _____

ADDRESS: _____

PHONE: _____

EMAIL: _____



I have already made provisions for
Holy Family Parish in my will.*

**Thank you for already considering Holy Family Parish
in your will and for letting us know in advance. Please
write your name so that we might be aware of your gift.*



LEGACY SOCIETY
HOLY FAMILY PARISH, DUXBURY

HOLY FAMILY PARISH
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WWW.HOLYFAMILYDUXBURY.ORG



LEGACY SOCIETY
HOLY FAMILY PARISH, DUXBURY

"For it is in giving that we receive."
-ST. FRANCIS OF ASSISI



LEGACY SOCIETY

HOLY FAMILY PARISH, DUXBURY

YOUR GIFT TO FUTURE GENERATIONS

The Holy Family Legacy Society's mission is to support those with the desire and capacity to include Holy Family Parish in their estate plans. Any proceeds received are reserved for long-term goals and are independent from annual operating revenues, allowing the church long-term resources and flexibility to complement the mission of Holy Family Parish.

WHAT IS PLANNED GIVING?

Planned giving is a well-recognized method of transferring valuable gifts in the future on a reliable and tax efficient basis to schools, hospitals, churches, religious orders and other non-profit entities. Planned giving ranges across a broad spectrum of options from specific bequests in a will or trust to beneficiary designations in life insurance policies, charitable remainder trusts, transfers from IRAs and various other well recognized mechanisms.

BENEFITS OF PLANNED GIVING

Planned giving offers the unique opportunity to benefit both the recipient and the donor.

BEQUESTS

- ✓ Maintain control of your assets during life
- ✓ Make a gift to the church at your death

HOW IT WORKS:

You designate Holy Family Parish as the beneficiary of your will, trust or other instrument.

YOUR BENEFITS:

- ✓ Estate tax charitable deduction
- ✓ Life use and ownership of your property

RETIREMENT PLAN & IRA DESIGNATIONS

- ✓ Protect the value of your retirement assets
- ✓ Avoid substantial estate tax

HOW IT WORKS:

You name Holy Family as a beneficiary of your IRA, 401(k) or other qualified plan. Any assets left in your plan at death pass to the church.

YOUR BENEFITS:

- ✓ You escape both income AND estate tax levied on the assets left in your retirement account

LIFE INSURANCE

- ✓ Make a "low cost" gift to the church without adversely affecting cash-flow
- ✓ Enjoy tax savings

HOW IT WORKS:

Make a gift of a paid-up life insurance policy to the church. Or designate Holy Family Parish as a beneficiary of a policy.

YOUR BENEFITS:

- ✓ Immediate income tax deduction for cash surrender value of policy
- ✓ Gift is from your estate - no cash required

OTHER OPTIONS

- ✓ Charitable Gift Annuity
- ✓ Charitable Remainder Trust

OTHER OPTIONS:

From Charitable Gift Annuities to Charitable Remainder Trusts, there are many other ways you can allocate a gift to Holy Family Parish upon your death.

Please contact us for more information about alternative gifts.

