

Choose the Gift Plan that Works for You!

YOUR GIFT	YOUR GOAL	YOUR BENEFITS	HOW TO
A GIFT IN YOUR WILL OR TRUST (BEQUESTS)	Defer a gift until after your lifetime.	Donation exempt from federal estate taxes and control of asset for your lifetime.	Name the NMCF in your will (designate a specific amount, a percentage or a share of the residue). *
GIFT OF IRA DISTRIBUTIONS	Take advantage of the gift opportunity available to donors age 70 1/2 or older.	Witness the impact of your generosity and eliminates income and estate taxes; no charitable deduction.	Transfer up to \$100,000 a year from your IRA to an eligible organization (excluding donor advised funds)
OUTRIGHT GIFT OF SECURITIES OR TANGIBLE ASSETS	Eliminate tax on capital gains.	Immediate charitable deduction of full fair market value and elimination of capital gains tax.	Contribute stocks, bonds, real estate or tangible assets with long-term capital gains.
CHARITABLE REMAINDER TRUST	Secure a fixed income and supplement your retirement funds.	Fixed payments for life, often at a higher rate of return and immediate income tax deduction.	Create a charitable trust that pays you a set income annually.
BENEFICIARY OF LIFE INSURANCE	Make a significant gift with less cash outlay. Reduce taxable estate.	Insurance is removed from your taxable estate and income tax is a charitable deduction for donated premiums.	Purchase an insurance plan as a gift and name the NMCF as the beneficiary.
CHARITABLE LEAD TRUST	Reduce gift and estate taxes on assets you pass to children or grandchildren.	Reduces your taxable estate and property is kept by your family, often with reduced gift taxes.	Create a charitable trust that pays fixed or variable income to the NMCF for a specific term.



OUR COMMITMENT TO HELP

The Northern Michigan Catholic Foundation (NMCF) gives you the opportunity to provide lasting charitable support to your parish, school, the local Catholic Community, or other particular Catholic ministries or causes beyond your lifetime.

Please consult your tax advisor when considering these types of gifts.

**For specific bequest language, visit our website.*

We can find a plan that's right for you!

Leaving a legacy reveals our hearts and is a final testament to who we are, what we value, and whom we love. Regardless of your age, circumstance or economic status, we encourage you to begin to think about the Catholic legacy you wish to leave behind.

We know that if you make a contribution, it's because you believe in the causes close to your heart and want to make a difference in the lives of others here in our Northern Michigan Catholic community. What a wonderful way to steward your finances to pass along your love for our beautiful Catholic faith.

More Information

For more detailed information on all of the various planned giving vehicles, and for a full list of all of our endowment funds visit our website at www.nmcatholicfoundation.org

Contact Christie Perdue, President at 231-922-9070 or by email at christie@nmcatholicfoundation.org

311 East Front Street
Traverse City, MI 49864



Financially supporting the spiritual, educational, and social needs of our Roman Catholic Community in Northern Michigan.



WAYS TO GIVE

