

## FORMS OF BEQUESTS

Because a charitable bequest to your parish is usually only a part of an estate plan it can take various forms.

The two most common bequests are a specific dollar amount or a percent of the total estate after taxes and administrative expenses.

The commitment can also be accomplished outside of the will by making the parish the beneficiary of an individual retirement account (IRA), life insurance policy, certificate of deposit or trust.

## CHANGING YOUR WILL OR LIVING TRUST

It is not necessary to have your present will or living trust changed in order to make a bequest to your parish. It can be accomplished by attaching a codicil to the will or an amendment form to the living trust.

Forms are available by calling the parish office.

# *St. Paul the Apostle Parish*

## LEGACY SOCIETY



## PROVIDING FOR THE FUTURE OF YOUR PARISH

St. Paul the Apostle Parish  
6400 Spring Street  
Racine, Wisconsin 53406  
886-0530

I/we have made provisions for a future gift to St.Paul the Apostle Parish and consent to be listed as a member of the society.

I/we wish to consider a future gift and would like to discuss the possibilities with someone.

Name \_\_\_\_\_ Name \_\_\_\_\_

Address and Zip Code \_\_\_\_\_

Telephone \_\_\_\_\_ Date \_\_\_\_\_

**WHAT DOES MEMBERSHIP MEAN?**

The society is an unstructured organization having no officers or regular meetings. However, it meets annually for dinner with our pastor to share our common satisfaction that we are providing for the future of our parish.

Your membership in the Legacy Society will help encourage others to join.

**HOW DO I BECOME A MEMBER?**

If you have already made provisions for your parish to benefit from your generosity in the future, you already qualify. Fill out the "Statement of Intent" and send it to us.

If you intend to qualify for membership, we are available to provide information and answer your questions. When your plans have been completed, fill out the "Statement of Intent" and send it to us.

"Statements of Intent" should be sent to:

Reverend William Dietzler  
St. Paul the Apostle Parish  
6400 Spring Street  
Racine, Wisconsin 53406

For information and answers to your questions return the attached Intent Form to the above address and you will be contacted.

**WHAT IS A LEGACY SOCIETY?**

A Legacy Society is comprised of a group of parish members, who through a bequest or some other deferred giving means, have provided for the future financial needs of their parish.

During one's lifetime there are often valid reasons that place a limit on what we would like to contribute to our parish. However sincere is our desire to contribute more, the unpredictability of life is a legitimate concern. More and more Catholics are making provisions in their wills, living trusts or utilizing other deferred giving arrangements to satisfy their desire that their parish be remembered.

**OUR LEGACY SOCIETY**

St. Paul the Apostle Parish has established a Legacy Society to encourage legacies to our parish. The only requirement for membership is to advise us your parish is being remembered. The confirmation is not binding and you do not reveal to us the amount.

St. Paul the Apostle Parish Legacy Society has over 80 members who invite you to join them.