



Archdiocese of San Antonio Planned Giving

As a faithful Catholic steward, you support your parish, school and archdiocesan ministries with your time, talent and treasure throughout your life. Planned giving is an act of stewardship that continues beyond one's lifetime. Planned gifts offer a donor a wide variety of giving alternatives.

We advise that you consult with your personal legal, tax, and/or financial advisors before funding your gift.

BEQUEST

A charitable bequest of your choosing defines your legacy and creates a permanent statement of your faith and values. It is one or two sentences in your will or living trust which designate leaving a Catholic institution or ministry a specific item, amount of money, or gift.

BENEFICIARY DESIGNATIONS

One of the easiest gifts you can make is to name the Church as a beneficiary of one of your assets, such as your retirement plan or life insurance policy.

SECURITIES

Making a gift of stock is one of the most advantageous forms of giving. By making a gift of your appreciated securities, you can avoid paying capital gains tax and federal estate tax.

REAL ESTATE

Gifts of appreciated real estate are similar to gift of appreciated stock. You can avoid capital gains taxes and may deduct the fair market value of the real estate.

**STRUCTURED AND WELL-PLANNED GIFTS CAN DRAMATICALLY
ELEVATE THE ABILITY TO MAKE A MORE GENEROUS GIFT.**

There are many advantages to planned giving. Depending on the planned gift, benefits may include charitable tax deductions, reduced capital gains tax, income stream for the remainder of one's life and dependents, and lower estate taxes for the donor's heirs. Planned giving can give one's name recognition within the archdiocese, as well as acknowledge a lost loved one.

"As each one of has received a gift, use
it to serve one another as good stewards
of God's varied grace."

1 Peter 4:10

