

## Contact The Catholic Foundation if...

- A parishioner wants to name your parish as a beneficiary of a financial account.
- A parishioner has questions about charitable tax deductions.
- A parishioner or their representative want to discuss their will or a complex charitable gift.
- A parishioner wants to make a gift of personal property (jewelry, art, vehicles, etc.).
- A parishioner wants to donate land or real estate.
- A parishioner wants to give via stock or other securities.
- A parishioner wants to give restricted gift or a single donation of \$10,000, outside of OCA or a campaign, necessitating a signed gift agreement.
- You receive correspondence stating you are the beneficiary of an estate or specific asset.
- You receive a claim form or an application to open an inherited IRA account from a financial institution.
- If you want to increase larger gifts and long-term support for your ministry.
- To establish or build an endowment or reserve fund and for related reports.
- If you'd like to host an educational event about charitable planned giving or other philanthropy topics.

Not Sure? Call Anyway!



**The Catholic Foundation  
of Central Florida**

Inspire Giving. Fund God's Work.

**(407) 246-4889**

**The Catholic Foundation's Team is available to assist you  
and there is no cost for our donor services.**

If you need assistance with any of the following, contact the new **Discipleship & Stewardship Office** at (407) 246-4840 or [stewardship@orlandodiocese.org](mailto:stewardship@orlandodiocese.org)

- Our Catholic Appeal gifts and pledges.
- Offertory enhancement or online giving programs.
- Capital Campaigns and related gifts and pledges.

Visit The Catholic Foundation's website for a variety of videos and resources for you and your donors. Scan the QR code to visit [CFOCF.org](http://CFOCF.org)



## Make it easy for donors to maximize their charitable giving

Customize and add language to your giving webpage

### ADDITIONAL WAYS TO GIVE

#### GIFT OF APPRECIATED SECURITIES

Contact your broker authorizing them to transfer X number of "XYZ Security" in kind to the Diocese of Orlando Fidelity Investments account:  
The Diocese of Orlando  
DTC #0226  
Acct. # X62-097373  
Federal Employer Identification # 59-1215378

For any gifts made via stock, please contact us at (407) 246-7186 or [stockgifts@orlandodiocese.org](mailto:stockgifts@orlandodiocese.org) and reference your name, type of stock and number of shares along with how you would like it distributed so we can identify the incoming stock and ensure it is attributed according to your wishes.

#### GIFT FROM YOUR IRA or DAF

Contact your account administrator to request the distribution. Checks should be payable to "LEGAL NAME OF ENTITY"  
EIN# \_\_\_\_\_  
And sent to:  
ENTITY'S ADDRESS

All checks should include your name and if possible, a memo including the purpose (offertory, campaign, etc.).

#### Have you considered a gift to us in your estate plans?

A simple way to make a lasting impact is listing us as the full or partial beneficiary of an IRA, Insurance Policy or Bank Account. There is no need for an attorney and this only requires an update to your account document.

[LEGAL NAME OF PARISH OR DIOCESAN ENTITY]  
Federal Tax ID # [\_\_-\_\_\_\_]

#### Below is bequest language that can be added to a Will or Trust:

I hereby give, devise, and bequeath to [LEGAL NAME OF PARISH/ MISSION OR DIOCESAN ENTITY] located at [STREET ADDRESS, CITY, STATE, ZIP], Federal Tax ID # [\_\_-\_\_\_\_], the following: [AMOUNT, PERCENTAGE, REMAINDER, OR OTHER SPECIFIC ASSET] [for its general use and purpose/for SPECIFIC PURPOSE] to be used [AS A ONE-TIME LUMP SUM/OVER \_\_\_\_ NUMBER OF YEARS/TO ESTABLISH AN ENDOWMENT FOR PERPETUAL SUPPORT]. In the event that [LEGAL NAME OF PARISH/MISSION OR DIOCESAN ENTITY] shall no longer exist or be within the jurisdiction or possession of the Roman Catholic Church, then such bequest shall inure to the successor or juridic person, designated by the Roman Catholic Bishop of Orlando to serve a substantially consistent purpose.

#### PLEASE NOTIFY US OF YOUR LEGACY GIFT

If you've already included a gift to the Church in your will but have not yet notified us, please let us know so we can thank you for your generosity and include you in the Vivos Christi Society.

*Note: This is not professional tax or legal advice. For specific advice on financial and estate planning, and to incorporate the sample bequest language above, please consult a qualified advisor or attorney.*

# Foundation Team

## We are here to help!

The Catholic Foundation of Central Florida's Team is available to assist you and there is no cost for our donor services.



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