



THE CATHOLIC DIOCESE *of* RALEIGH

PLANNED GIVING NEWSLETTER

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The Roman Catholic Diocese *of* Raleigh

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Raleigh, NC 27613-1620
919.821.9774

www.dioceseofraleigh.plannedgiving.org

A Fierce Defender *of Society's Underdogs*




Charlie and Marty Coe, long-time parishioners of Sacred Heart Cathedral Parish, have made a future gift commitment to the Diocese of Raleigh as part of their estate plan. The gift will benefit the wonderful works of Catholic Charities of the Diocese of Raleigh and will honor the memory of their daughter, Heidi Anne Coe (1970-2013). The gift will be used to fund the Charles and Marty Coe Family Endowment, a testamentary arrangement that will provide Catholic Charities with an annual source of funding in perpetuity.

Heidi was born with cerebral palsy. She could not read or write, suffered from bipolar disorder, and had 11 surgeries three of which were life-threatening. Despite her disabilities, Heidi led an amazing life and was a joy to all. She loved all people and truly never met a stranger. Though unable to read or write, she graduated from Cathedral School, Cardinal Gibbons High School, and North Carolina

State University with a degree in Social Work. She then spent many years volunteering at the Ruth Sheets Daycare Center helping adults with physical and mental challenges.

Heidi also served for many years on the board of, Handicapped Encounter Christ (HEC), an organization that gives the disabled and able bodied opportunities to grow spiritually and socially. For her unstinting efforts, she was given the Dick Stubbing Award.


Finally, Heidi was a fierce defender of society's underdogs. She followed the news avidly and advocated policies that help the disadvantaged. She was fervently in support of the many and varied ways that Catholic Charities assisted those in need.

To read more inspiring testimonials please [visit our donor page](#). 

If you would like to learn how you can establish an endowment fund or structure a gift through your estate and honor a loved one, please contact Ryan Flood, Director of Special gifts for the Diocese of Raleigh. Ryan's promise to others is careful listening, attention to your best interest, solutions that reflect your values and priorities, professional expertise and absolute confidentiality. Ryan can be reached directly at 919-821-9774 or via his email address at ryan.flood@raldioc.org

Were you born prior to 1947? you may be able to take advantage of the IRA charitable rollover option



If you were born prior to 1947 and own an Individual Retirement Account (IRA) you may be able to take advantage of the [IRA charitable rollover option](#) .

If you are 70 ½ years of age or older, you can direct a distribution each calendar year to charity from your IRA. This distribution includes your RMD (Required Minimum Distribution) up to \$100,000 per individual. The distribution is tax-free and counts towards your required minimum distribution with the added bonus of providing a gift to your favorite diocesan ministry, parish or school. More and more diocesan parishioners haven taken advantage of this gifting option since it was made permanent in the 2015.

Here's How It Works:


- You must be 70½ or older at the time of distribution.
- You may distribute any amount up to \$100,000 in a calendar year to charity, as long as it is completed by December 31 of the year in which you intend to make the charitable distribution.
- Your IRA administrator must make the distribution directly to the charity, or you may write a check payable to the charity from your IRA checkbook.
- If you make a gift to the diocese from your IRA, please include written instructions on how you would like to designate your gift by making a note on your IRA check.
- IRAs also make excellent deferred gifts. While this topic is fresh on your mind, please inquire how to make the Church a beneficiary of your will, or trust or IRA.

Certain restrictions and requirements* must be followed when making this type of gift. If you have questions, please call the Diocese of Raleigh at 919-821-9774, or email ryan.flood@raldioc.org. Before proceeding, you should also consult with your tax advisor to discuss your particular situation including any impact of your state's tax laws.

For a sample letter of instruction to your IRA administrator requesting a distribution to the Diocese of Raleigh please contact Ryan Flood, Director of Special Gifts.

** For example, the following transfers will not qualify: distributions to private foundations, to donor advised funds, for life income gifts (e.g., charitable remainder trusts), and for any purpose that entitles you to receive a benefit, such as preferred seating at athletic events or tickets to a dinner.*

Maximizing your philanthropic impact

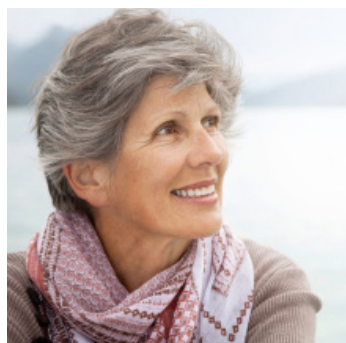
Naming a diocesan ministry, parish or school as a [beneficiary of your IRA](#)  could save you as much as 70% that otherwise may have been taxed if left to an individual. The funds in an IRA which are designated to

a qualified charity, such as the Diocese of Raleigh allows the Diocese to receive the full amount tax-free, allowing you to maximize the impact of your gift to the Church.

Would you like to make a charitable gift that supports your parish or favorite Diocesan ministry and receive income for life?

A charitable gift annuity (CGA) is an agreement between an annuitant(s) and the Catholic Diocese of Raleigh by which the annuitant(s) irrevocably transfers assets (usually cash or stock) to the Diocese in exchange for fixed payments for life. The Diocese limits these gifts to donors who are at least 70 years old (65 for deferred gift annuities).

How a Charitable Gift Annuity works



LUCY is 75 years old and retired. She has a \$25,000 CD earning her 1.5% that will mature soon. She would like to use the \$25,000 to establish a charitable gift annuity that will ultimately benefit the


Diocesan Seminarian Education Program. Lucy is not able to make an outright gift, but she recently heard about a charitable gift annuity offered through the Diocese of Raleigh in which she can direct her gift to the Seminarian Fund.

Lucy will give the diocese \$25,000 to fund a charitable gift annuity, which will pay her income at a rate of 5.8% until her death. Upon her death, the funds remaining in the annuity account will be transferred to the Seminarian Fund to assist with the educational needs of future diocesan priests. This transfer will be “outside of her estate” and will occur very soon after her death, without waiting for probate and without any fees being extracted for attorney’s fees or court costs.

To receive a no cost, no obligation gift illustration please contact Ryan Flood at ryan.flood@raldioc.org or complete the newsletter reply piece located in the back of the newsletter. Please return it via U.S. Mail or scan it

The Father Thomas F. Price *Catholic Heritage Society*



The Father Thomas F. Price Catholic Heritage Society was created in 2012 to recognize individuals who have included a parish, school, the Diocese of Raleigh or any institution of the diocese in [their estate plan](#) .

You can join the Father Price Society to build a lasting foundation of financial support by notifying the Diocese of your gift. All disclosure is confidential, and requests to remain anonymous are strictly honored.

The Director of *Special Gifts*



If you or your advisors have any specific questions regarding the planning of your estate, please contact Ryan Flood, Director of Special Gifts. His promise to others is careful listening, attention to your best interest, solutions that reflect your values and priorities, professional expertise and absolute confidentiality.

Contact Ryan directly

919-821-9774 or email at ryan.flood@raldioc.org.
7200 Stonehenge Drive, Raleigh, NC 27613-1620.

Save the *Dates*

Ordination for the Transitional Diaconate

April 22, 2017 at 10:00 a.m.
St. Ann Catholic Church, Clayton, NC

Priestly Ordinations

June 3, 2017 at 10:00 a.m.
St. Catherine Catholic Church, Wake Forest, NC

[Please support our Seminarians](#) 

Please complete and mail this confidential form to:
Ryan Flood, Director of Special Gifts
The Catholic Diocese of Raleigh
7200 Stonehenge Drive Raleigh NC 27613-1620

2017 Spring *Seminars*

Catholic Estate and Personal Planning Seminars



Catholic Diocese of Raleigh

Estate Planning Master Series
Dates & Times: March 2nd, 9th
and 16th 10:00 – 11:20 a.m.
Location: The Catholic Center
- 7200 Stonehenge Drive,
Raleigh, NC 27613

St. Thomas More

Catholic Church
Date and Time: May 17th from
12:00 – 1:15 p.m.
Location: 940 Carmichael
Street, Chapel Hill, NC 27514

St. Peter

Catholic Church
Date & Time: March 15th from
12:00 – 1:15 p.m.
2700 East 4th Street
Greenville, NC 27858

Sacred Heart

Catholic Church
Date and Time: TBD
Location: 300 Dundee Road,
Pinehurst
NC 28374

St. Mark

Catholic Church
Dates & Time: March 23rd
from 12:00 – 1:15 and 6:30 –
7:45 p.m.
Location: 1011 Eastwood Road
Wilmington, NC 28403

St. Luke

Catholic Church
Date and Time: TBD
Location: 12333 Bayleaf
Church Road, Raleigh, NC
27614

- ☐ Please send me the following Workbook/Information:
A Catholic Estate and Personal Planning Workbook
- ☐ I have already made provisions in my estate plans
for a bequest to my parish and/or the Diocese, but
would like to request additional information about
planned giving in the Diocese of Raleigh.
- ☐ I am considering a bequest to my parish, school or
Diocesan ministry and request approved bequest
language.
- ☐ I'm interested in Charitable Gift Annuities. Please
send me a complementary proposal and information.
My/our age(s): _____ / _____

Name: _____

Mailing Address: _____

City: _____

State: _____ Zip: _____

Contact Preferences

☐ Please contact me (us) via email.
The email address is: _____

☐ Please contact me (us) by phone at:

☐ I have already made provisions in my estate plans for a bequest to my parish and/or the Diocese and would like additional information about becoming a member of the Father Thomas F. Price Catholic Heritage Society.