



May, 2014

Dear Parishioners,

For many months our Finance Committee has been discussing the wisdom and feasibility of establishing a way for parishioners with the ability and desire to designate Holy Family Parish as a beneficiary in their estate planning. In recent days the Committee has recommended that we proceed with the development of The *Holy Family Legacy Society* and I am pleased to report I have accepted their recommendation with enthusiasm and gratitude.

#### **YOUR GIFT TO FUTURE GENERATIONS**

The *Holy Family Legacy Society's* mission is to support those with the desire and capacity to include Holy Family Parish in their estate plans. Any proceeds received are reserved for long-term goals and are independent from annual operating revenues, allowing myself and future pastors long-term resources and flexibility to complement the mission of Holy Family Parish.

#### **WHAT IS PLANNED GIVING?**

Planned giving is a well-recognized method of transferring valuable gifts in the future on a reliable and tax efficient basis to schools, hospitals, churches, religious orders and other non-profit entities. Planned giving ranges across a broad spectrum of options from specific bequests in a will or trust to beneficiary designations in life insurance policies, charitable remainder trusts, transfers from IRAs and various other well recognized mechanisms.

#### **BENEFITS OF PLANNED GIVING**

Planned giving offers the unique opportunity to benefit both the recipient and the donor. As we move forward to implement the *Legacy Society*, we will offer periodic learning opportunities for those parishioners who may be thinking about their estate planning efforts and would like additional information on the benefits of this type of donation. The Finance Committee will also be providing materials that will explain the benefits to you and your family.

### **HOW YOU CAN GET INVOLVED:**

We simply ask that if and when you create a will or next update the one you have, that you will prayerfully consider naming Holy Family Parish as a beneficiary. If you would like to consider other options, or if you have already named Holy Family in your will, I would ask you to contact John Dwyer who will assist you with the next step.

### **OUR INTENTIONS AND PROMISE**

Your decision to make a bequest or any other form of planned giving will remain strictly confidential in all respects. The decision to be enrolled in the *Holy Family Legacy Society* would be yours alone; your anonymity would be preserved, as would the nature of the gift, its details and the amount. We recognize that the objectives of the *Legacy Society* are very much in the nature of long range planning and thus there will be no collections or campaigns. We will provide reminders in the bulletin that the Society is available to those who may be considering the issues of estate planning, but the first step will always be yours.

### **OUR HEARTFELT APPRECIATION**

As Holy Family Parish continues along the road of the New Evangelization we will confront a list of challenges, not the least of which will be financial. The *Holy Family Legacy Society* seeks to foresee some of those needs, and permit those of us who are able, to support the future work of the church. We remain grateful to those who choose to align their legacy with ours for years to come.

**God bless you!**

A handwritten signature in black ink that reads "Fr. Bob". The signature is written in a cursive, slightly slanted style.

Father Bob