



## **Simple ways to support Holy Trinity Parish:**

1.) Give cash; 2.) Make an IRA charitable rollover (for those over 70 ½); 3.) Give appreciated stock; 4.) Make a provision in your Will; 5.) Create a Charitable Gift Annuity and receive income for life; 6) Donate a life insurance policy; 7.) Make us a beneficiary of part of a retirement fund and/or a life insurance policy.

### **IRA Charitable Rollovers**

Those over 70½ years of age may make gifts of up to \$100,000 for charitable purposes from their minimum distribution and/or the principal of their Traditional IRA's (Individual Retirement Accounts) without having to claim those funds as income. Contact your IRA custodian and instruct them to prepare checks made payable to your parish's Our Campaign for The Church Alive!, your Parish Share donation or any other restricted or unrestricted gift to your Holy Trinity Parish This program is especially beneficial to donors who use the short form when filing their income tax.

### **Gifts of Appreciated Stock**

Your gift of appreciated stock to the Diocese avoids capital gains tax and can be restricted for a parish use such, as a capital campaign, building fund, scholarship, Parish Share, or given unrestricted for the parish's greatest need.

### **Charitable Gift Annuities**

This tool enables you to make a gift to Holy Trinity Parish and provide you with monthly income. For example, Mike, a 75 year-old who invests \$50,000 in a diocesan gift annuity can generate an immediate gift of \$19,246 for Holy Trinity Parish and receive monthly income payments of \$241 for life. That beats getting 1% or 2% on a CD, and there's an immediate income tax deduction and payments can be direct deposited into your account. A gift annuity also takes the amount you donate out of your estate.

### **Bequests**

You can instruct your attorney to make a provision in your will or living trust using this language: "I give, devise and bequeath (the following amount \$\_\_\_\_\_ or percentage - % of my estate, or percentage of the remainder of my estate or property) to Holy Trinity Parish at (include our address)".

### **Beneficiary Designations**

You can make a Holy Trinity a beneficiary of a life insurance policy or retirement plan.

### **Outright Gifts of Life Insurance**

You can give a paid-up life insurance policy to Holy Trinity Parish and receive a charitable tax deduction for the net cash value in the policy. Such gifts can be used to endow scholarship for our school students or support an important project.

*For information on any these or other gift ideas, please contact B.J. Osso, Holy Trinity's Director of Development, at [bjosso@holytrinityrobinson.org](mailto:bjosso@holytrinityrobinson.org) or 412-787-2140, ext.101, or Paul Stabile, Diocesan Director of Planned Giving in the Office for Stewardship at [stewardship@diopitt.org](mailto:stewardship@diopitt.org) or 412-456-3055.*

*Please remember Holy Trinity as you plan your estate. Consult your attorney or tax advisor for more specific advice.*