

Legacy Opportunities



**your
planned
gift will
transform
lives
through our
programs
and
services**



Catholic Charities
Diocese of Charlotte

reducing poverty | strengthening families | building communities

— what is charitable gift planning?

Charitable gift planning – or planned giving – involves donating assets to a charitable organization at the time of, or in anticipation of death. Expressing your wishes in a well-drafted will or living trust lets you protect and provide for the people you care about the most and ensures that your charitable wishes will be honored.

Planned giving does not have to be complicated –and it is not only reserved for those with great wealth. It can be as simple as adding a bequest in your will. Other options include giving through your IRA, life insurance policies, or gifts of real estate. Read through this brochure to learn more about some of the most popular ways to include charitable gifts in your plans.

Plan for your loved ones first, and prayerfully consider including a charitable gift to Catholic Charities Diocese of Charlotte, a Christian ministry of charity, service, and justice dedicated to reducing poverty, strengthening families and building communities.

For more information on planned giving options,
contact the Planned Giving Team at the
Diocese of Charlotte:

Gina Rhodes @ 704.370.3364 or gmrhodes@rcdoc.org
Heidi Kelley @ 704.370.3348 or hmkelley@rddoc.org

This publication aims to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the service of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions may vary based on applicable federal discount rates, which can change monthly. Some opportunities may not be available in all states.

methods of planned giving

Type of gift	Form of gift	Benefit to CCDOC	Benefit to you
Outright gift	• Cash • Stocks/Securities • Real Estate • Insurance	Your gift can offer immediate support or be invested to create lasting income for the programs and services of Catholic Charities Diocese of Charlotte (CCDOC).	• Income tax deduction • No capital gains tax on appreciated gifts
Bequest	• Cash • Real Estate • Personal Property • Percentage of Estate • Remainder of Estate	Your gift can offer immediate support or be invested to create lasting income for the programs and services of Catholic Charities Diocese of Charlotte (CCDOC).	• Possible estate tax deduction • Opportunity to make a perpetual gift
Charitable gift annuities	• Cash • Stocks/Securities • Real Estate	• Cash • Stocks/Securities • Real Estate	• Possible estate tax deduction • Perpetual gift
Insurance policies	Name CCDOC as the policy owner and/or beneficiary	Your gift can offer immediate support or be invested to create lasting income for the programs and services of Catholic Charities Diocese of Charlotte (CCDOC).	• Substantial future gift to CCDOC at manageable cost • Income tax deduction for the value of the policy when transferred • Premium payments may be deducted as gifts
Charitable remainder trusts	• Cash • Stocks/Securities • Real Estate	CCDOC receives full face value of policy upon death of the donor or may receive current surrender value prior to donor's death	• Variable or fixed income • Option to defer income • Income tax deduction • Reduction of estate tax • No capital gains tax on appreciated gift
Charitable lead trusts	• Cash • Stocks/Securities • Real Estate	CCDOC received current gift income to support the work named by the donor	• At the end of the trust period, principal returns to donor and heirs • Principal can pass with little or no shrinkage • Tax reduction
Retirement plan/IRA	Name CCDOC as beneficiary of death benefits	Your gift can offer immediate support or be invested to create lasting income for the programs and services of Catholic Charities Diocese of Charlotte (CCDOC).	• Opportunity to make a major gift • Estate & income tax saving

our programs and services

ESSENTIAL NEEDS

Burial Assistance

Clinical Counseling

- *In-Person*
- *Telehealth*

Disaster Response

Food Access

- *Food Pantries*
- *The Bulb partnership*

Making a House a Home Furniture Ministry

Supportive Services for Veteran Families

FAMILY & YOUTH SERVICES

Immigration Legal Services

Pregnancy Support & Adoption Services

Refugee Services

- *Employment Services*
- *Refugee After-School*
- *Refugee Stability Coaching*

Wee Care Shoppe

- *Baby Items (e.g. diapers & wipes)*
- *Infant & Toddler Clothing*

EDUCATION

Catholic Social Teaching

SOCIAL CONCERNS & ADVOCACY

Catholic Campaign for Human Development

Catholic Relief Services

All services vary by location and are provided either free of charge or on a sliding fee scale, and are offered to all regardless of race, gender, or religion.

Contact us
info@ccdodc.org

Learn more
ccdodc.org

how to establish an endowment

By establishing an endowment to benefit Catholic Charities Diocese of Charlotte (CCDOC), you are making a lasting commitment to support Catholic Charities' mission to strengthen families, build communities, and reduce poverty locally.

An individual or family may establish a named endowment with \$25,000. Establishing an endowment to benefit CCDOC requires answering several easy questions:

- What ministry do you want to benefit from your endowment?
- How much do you wish to contribute to establish your endowment?
- How do you wish to make your contribution? Cash? Stock? Real estate? IRA?
- Do you wish to name your endowment?
- Do you want to establish your endowment now or through a bequest in your will?
- How much do you wish to contribute to establish your endowment?

Our planned giving staff will be happy to speak with you regarding your questions to ensure that your wishes are met. An endowment agreement can be drafted by our staff and comprehensively reviewed with you.



add to an existing endowment

The Foundation of the Diocese of Charlotte has a variety of endowment funds that benefit CCDOC. You can add to a current endowment or establish one of your own.

You can decide the amount you want to contribute, whether you want to do it immediately or after death, and whether you would like to use cash or other appreciated assets to make your gift.

— our mission

At Catholic Charities, our mission is to nurture pathways to stability, dignity, and opportunity for anyone in need, regardless of race, gender, or religion.

As a Christian ministry of charity, service, and justice, we are dedicated to providing help to those in need, hope to those in despair, and inspiration for others to follow.

— office locations

Asheville

50 Orange Street
Asheville, NC 28801
(828) 255-0146

Charlotte

1123 South Church Street
Charlotte, NC 28203
(704) 370-3262

Greensboro

2311 West Cone Boulevard, Suite 230
Greensboro, NC 27408
(336) 288-1984

Lenoir

328-B Woodsway Lane NW
Lenoir, NC 28645
(828) 434-5710

Murphy

27 Hatchett Street
Murphy, NC 28906
(828) 835-3535

Salisbury

601 Mocksville Avenue
Salisbury, NC 28144
(704) 370-3315

Winston-Salem

1612 14th Street NE
Winston-Salem, NC 27105
(336) 727-0705