



Planned Giving

And

Major Gifts

Church of the Incarnation
holds a 501 (c) (3) tax-exempt status
with the Internal Revenue Service

Plan the Timing of Your Gift

⬇ Types of Charitable Gifts

- Gifts of Cash
- Gifts of Appreciated property
- Gift of Mutual Funds
- Gifts of Real Estate

⬇ Points to Consider

- Will it serve to advance our parish mission?
- Am I giving the most appropriate gift?
- Have I considered tax consequences?
- Have I sought counsel advice?

⬇ Benefits donors can expect:

- Help the parish mission
- Income tax savings
- Capital gain tax savings on contributions of certain appreciated gifts
- Elimination of federal tax in certain situations
- Reduced estate settlement cost

***Please consider your continued support to
Church of the Incarnation
By making a gift through your will.***



Your Will and Charitable Interests

Perhaps the most important document to you and your loved ones is your will. This document provides for a clear and specific understanding as to how you want to provide for your loved ones and how to transfer your assets.

The Four “P’s” of Estate Planning:

- ⬇ **People:** List the people and charitable organizations that are important to you and how you want to provide for them.
- ⬇ **Properties:** List the properties that comprise your estate. Include cash, securities, real estate, life insurance, retirement plans, etc.
- ⬇ **Plan:** Design a plan for your family and charitable interests.
- ⬇ **Planners:** Consult professionals who will help you put your plan in proper legal form.

How Can I give to Church of the Incarnation through my Will?

- ⬇ Designate a percentage of your estate.
- ⬇ Designate a specific amount of your estate to the parish.
- ⬇ Designate the remainder of your estate to the parish, after providing for your loved ones.

Start Now!

