

**Clergy Health and Welfare Endowment -**



helps elderly, frail priests who have no other means of care in their retirement years.

**Catholic Education Endowment -**



helps children attend Catholic School, responds to religious education and lay ministry needs.

**Catholic Charities Endowment -**



helps those most in need in our 13 county Diocese with vital social services.

**Evangelization Endowment -**



helps train musicians and lectors, outreach at the Mall Chapel and through FAITH & FaithLife.

**Bishop Donald W. Trautman STD, SSL**



***Feed My Sheep*** Endowment directly helps youth and people suffering from spiritual and material Poverty in the Erie Diocese.

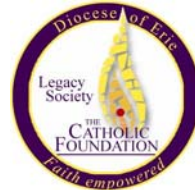
*The Catholic Foundation  
Legacy Society*

**Becoming a Member**

You can become a member of The Catholic Foundation Legacy Society with a promise of a planned gift to The Catholic Foundation of the Roman Catholic Diocese of Erie, Inc.

**Examples of Planned Gifts:**

- ◆ Will Bequests or Residue of Estate
- ◆ Life Insurance
- ◆ Beneficiary Designation through an IRA or Pension Plan
- ◆ Gifts of Real Estate
- ◆ Charitable Gift Annuity



**Benefits of Membership:**

- ◆ Attend a Mass & Recognition event annually where new inductees are honored
- ◆ Receive a keepsake in honor of your planned gift
- ◆ Be included in the prayers of Bishop Donald W. Trautman, STD, SSL
- ◆ Informative resources for your use

*“Together, we can do this.”*

**The Catholic  
Foundation**

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Spirit led.

Faith empowered.



**THE  
CATHOLIC  
FOUNDATION**

## Purpose

The Catholic Foundation, established in 2007 through the generous donors of the Capital Campaign, connects people of vision and generosity to the most basic needs of our communities and our people. It is a medium for personal, powerful expressions of faith, hope and love.



The Catholic Foundation is located in Saint Mark Catholic Center, Erie, PA.

## Mission Statement

The Catholic Foundation supports religious, educational, social and pastoral ministries by investing the gifts of donors who wish to make a lasting difference for people throughout the thirteen counties of the Roman Catholic Diocese of Erie.

The Catholic Foundation is a tax-exempt 501(c)(3) non-profit organization.

## Options for Your Charitable Giving

- ◆ **Cash.** This is a simple and common way to make a gift.
- ◆ **Bequests.** Leave a percentage, an exact amount or residual of your estate.
- ◆ **Securities.** Choose stocks that have increased greatly in value, particularly those producing a low yield.
- ◆ **Bank Accounts and CDs.** Name us as the “payable-on-death beneficiary” of your bank accounts or on certificates of deposit. You own the assets for your lifetime and have them available for your use. Upon your death, assets pass directly to The Catholic Foundation.
- ◆ **Retirement Plan Assets.** Your most efficient estate planning option maybe leaving all or a portion of your retirement plan to charity, because tax laws often subject these assets to the highest combined income and estate taxes upon death.
- ◆ **Life Insurance.** Rather than cancel policies you no longer need, you could name The Catholic Foundation as the beneficiary, or simply donate the policies outright.
- ◆ **Charitable Gift Annuity.** This is a simple contract between you and us that pays you a fixed dollar amount for your lifetime. The older you are, the higher your annuity rate. Enjoy doing a calculation on our website.
- ◆ **Charitable Remainder Trust or Charitable Lead Trust.** Visit our website at [www.TCFrcd.org](http://www.TCFrcd.org) for information.
- ◆ **Real Estate.** This is a simple donation if you own property that is not mortgaged, has appreciated in value and you no longer need or use. This has numerous benefits for you.
- ◆ **Retained Life Estate.** You can transfer the deed of your personal residence or farm to The Catholic Foundation now and keep the right to live in and use the property for your lifetime. You will receive a current charitable deduction in an amount that is based on your life expectancy and the value of the property.

## Examples of Bequest Language

### General Bequest

I give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) or \_\_\_\_\_ Percent (\_\_\_\_\_% ) to **The Catholic Foundation of the Roman Catholic Diocese of Erie, Inc.,** a nonprofit organization incorporated in the State of Pennsylvania, the administrative office at 429 East Grandview Boulevard, Erie, Pennsylvania, for its general purposes.

### Residuary Estate

I give my residuary estate, which is all the rest, residue, and remainder of my property, real and personal, of every kind and description and wherever located, belonging to me at the time of my death or subject to my disposal, by will to **The Catholic Foundation of the Roman Catholic Dioceses of Erie, Inc.,** a nonprofit organization incorporated in the State of Pennsylvania, the administrative office at 429 East Grandview Boulevard, Erie, Pennsylvania, for its general purposes.

### Specific Purpose\*

I give and bequeath \_\_\_\_\_ Dollars (\$ \_\_\_\_\_) or \_\_\_\_\_ Percent (\_\_\_\_\_% ) to **The Catholic Foundation of the Roman Catholic Diocese of Erie, Inc.,** a nonprofit organization incorporated in the State of Pennsylvania, the administrative office at 429 East Grandview Boulevard, Erie, Pennsylvania, to be used for the following purpose: examples-Clergy Health & Welfare, Catholic Education, Catholic Charities, Evangelization or Catholic parish, school or ministry.

\*If you designate a particular purpose for your bequest, inclusion of the following language will ensure that your gift will always remain productive and will help The Catholic Foundation respond to changing needs and conditions:

*If, in the future, it is the opinion of the Board of Directors of The Catholic Foundation that all or part of the income of this fund cannot be usefully applied to such purpose, it may be used for any related purpose that in the opinion of the Board of Directors will most nearly accomplish my wishes.*

