

## Planned Giving for The Marists



### ***Gifts of all sizes and types make a difference.***

*Planned gifts, in particular, allow you to fulfill personal, financial and philanthropic goals while establishing a legacy of support that will echo in Marist ministries around the world.*

*Here are some examples. Call or email for more information.*

#### **BEQUEST**

A deferred commitment made through your will or trust. This is the simplest type of planned gift to make and one of the easiest to implement. A gift of this type allows you to make future provisions for the Marists while maintaining the financial flexibility to meet current obligations. An estate tax charitable deduction may also result.

#### **LIFE ESTATE RESERVED**

A transfer of personal property (residence or farm) that allows you to retain use of the property during your lifetime and receive a current income tax deduction.

#### **FAMILY LEAD TRUST**

A transfer of cash or property to a trust that makes payments to the Marists for a number of years and then passes to your family with no additional tax.

#### **LIFE INSURANCE**

A simple way for donors of all ages to make a gift of transformational size. Transferring ownership of a life insurance policy to the Marists provides the added benefit of claiming your annual premium payment as a charitable deduction.

#### **CHARITABLE REMAINDER TRUST**

A transfer of cash or property to a trust that makes payments for your lifetime or a set number of years and then passes what remains to the Marists. This is a good option for those wishing to sell appreciated property producing little or no income without paying capital gains tax.

#### **IRA ROLLOVER**

Though not a planned gift in the traditional sense, this is a popular form of giving for donors 70.5 and above that allows you to “roll over” up to \$100,000 directly from your IRA to the Society of Mary without claiming the transferred assets as income. As an added benefit, rollover gifts can also qualify as your required minimum distribution.



Being Marist, Together

Marist Development Office • 698 Beacon Street • Boston, MA 02215  
Office: 617-451-3237 • Fax: 617-451-3247  
development@maristsociety.org  
societyofmaryusa.org