

A photograph of a woman and three children, all smiling and wearing blue t-shirts with the Catholic Charities logo. The woman is in the center, with two children on either side of her. A third child is in front of her. The background is slightly blurred, showing other people in similar shirts.

THE LEGACY OF HELP AND HOPE



My late husband and I adopted a little girl from a Catholic Charities agency — she just turned 43! We chose to raise her in a city that helps those who need it.

That was my first contact with Catholic Charities, but throughout a long career in city government, I came to know more about the many services that Catholic Charities provides to New Yorkers. And I certainly called on them for help over the years, including advice on government issues, planning for my elderly parents, aid for a friend who was suffering from addiction, immigration services and rental assistance for a colleague, I could go on and on.



Kathleen B. Cudahy
CCNY Board Member

I am proud to have served as a Trustee for Catholic Charities for many years. But because of all I have received from Catholic Charities, I also consider myself to be a client. Fortunately, I am able to donate to Catholic Charities in some small measure.

I was raised with the understanding that we don't just give back, we also should be willing to give more. Sometimes that means stretching it a bit to make annual donations to various Catholic Charities agencies.

But I can also continue to give after I leave this life. Charitable annuities give me a charitable deduction and income for life with a remaining benefit for Catholic Charities. In addition, a trust provides for my daughter and also for Catholic Charities in the future.

Planned giving can be used by anyone — those with, and those without as much! Every donation to Catholic Charities helps those in need.

For more information, please call our Planned Giving Office at **646-794-2018**. You can also visit our website to learn which gift opportunity would be best for you at **CatholicCharitiesNY.giftplans.org**.

MISSION:

The Catholic Charities of the Archdiocese of New York seeks to uphold the dignity of each person as made in the image of God by serving the basic needs of the poor, troubled, frail, and oppressed of all religions.

LEAVE A LEGACY OF HELP AND HOPE

Catholic Charities of New York's Legacy of Help and Hope recognizes individuals who have made provisions to support Catholic Charities of New York through a planned gift. Your long-term commitment enables Catholic Charities of New York to plan for the future from a position of strength, and helps to alleviate people's suffering throughout New York — non-Catholics and Catholics alike. We hope you will consider including Catholic Charities of New York in your estate plans. Your legacy commitment will help future generations of women and children by providing help and creating hope.



BEQUESTS

Bequests are an important source of funding for Catholic Charities of New York. Bequests allow you to continue to support Catholic Charities of New York after your lifetime. You can make a bequest of a specific dollar amount, a percentage of your total estate, or the residuary remaining after all other bequests. There are significant tax advantages for you and your family.

The following is sample language that you may use to include Catholic Charities of New York in your will or trust:

"I give and bequeath to Catholic Charities of the Archdiocese of New York, 1011 First Avenue, 11th Floor, New York, NY 10022, the sum of \$ _____ (or a specific asset or _____ % or the residuary of my estate) to be used for its general charitable purposes."

RETIREMENT PLANS

Whether you participate in a company retirement plan or a fund you have established, such as an Individual Retirement Account (IRA), you may have investments that are now worth more than will be needed for the comfortable support of you and your family.

IRA CHARITABLE ROLLOVER GIFTS

If you are age 70½ or older, you can make a qualified distribution from your traditional IRA directly to Catholic Charities of New York up to \$100,000 annually. This doesn't need to be reported as income and counts towards your Required Minimum Distributions (RMD). You should contact your IRA plan administrator for their instructions on how to make a charitable contribution to Catholic Charities of New York. To calculate your RMD and make a tax-free gift to Catholic Charities of New York from your IRA, visit **[CatholicCharitiesNY.org/IRA](https://www.CatholicCharitiesNY.org/IRA)**.

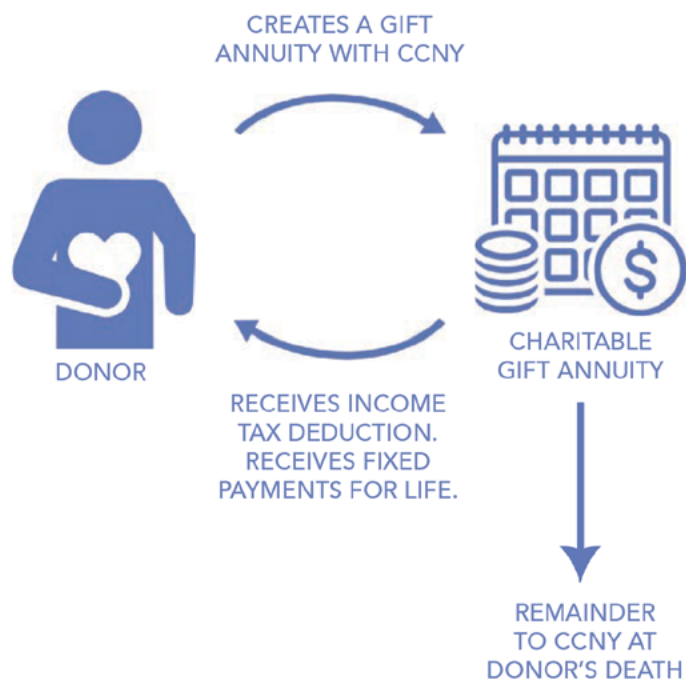
LIFE INSURANCE

If you own a life insurance policy and no longer require its protection, you may consider transferring ownership to Catholic Charities of New York or purchasing a new policy and naming Catholic Charities of New York as a beneficiary. You can request a "change of beneficiary" form and name Catholic Charities of New York as a sole or partial beneficiary.



CHARITABLE GIFT ANNUITIES

A charitable annuity is a simple agreement between you and Catholic Charities of New York. In exchange for your gift of cash, stock, or mutual funds, Catholic Charities of New York will pay you (and, if desired, another beneficiary) a fixed income for life. After your lifetime(s), proceeds remaining from your gift will help our neighbors as we would like to be helped — providing food to the hungry, sheltering the homeless, assisting the disabled, supporting families in crisis, nurturing children, welcoming the stranger, and more. For a personalized summary of annuity benefits based on your age and gift intentions, please fill out the information request form.



For more information about the current gift annuity rates, please contact our Planned Giving Office at Emily.Chau@CatholicCharitiesNY.org or 646-794-2018.

CHARITABLE REMAINDER TRUSTS

A Charitable Remainder Trust allows you to create a trust designating beneficiaries for life or for a fixed term. When the trust terminates, the remainder is left to Catholic Charities of New York. There are two types of charitable remainder trust options.

CHARITABLE REMAINDER ANNUITY TRUST

The income is a fixed amount and the donor cannot make additional contributions to the trust.

CHARITABLE REMAINDER UNITRUST

The income is a fixed percentage of the value of the trust and the donor can make additional contributions to the trust.

Your support saves lives. We are providing food to the hungry, sheltering the homeless, assisting the disabled, supporting families in crisis, nurturing children, and welcoming the stranger — with compassion and respect.

**YOUR LOVE AND GENEROSITY MADE A LIFESAVING IMPACT IN 2022.
BECAUSE OF YOU:**



As we carry out our shared mission to help solve the problems of New Yorkers in need — non-Catholics and Catholics alike, we hope you will continue to partner with us, and join The Legacy of Help and Hope today.

To speak to a Catholic Charities of New York representative in confidence about ways of giving, please contact:

Emily Chau
Director of Planned Giving
Emily.Chau@CatholicCharitiesNY.org

LEGAL NAME:

The Catholic Charities of the Archdiocese of New York
Tax ID #: 13-5562184
1011 First Avenue, 11th Floor, New York, NY 10022
CatholicCharitiesNY.org

