



EASY WAYS TO CREATE YOUR LEGACY

Reflect your values with a gift that costs you nothing now



What Will Be Your Legacy?

Your commitment to the Archdiocese of Chicago reflects your values and vision for the future — a future with strong Catholic parishes, schools and ministries.

When you include a gift to the Archdiocese of Chicago in your will or by beneficiary designation, you establish a living legacy that will impact the future of our Catholic community and advance God's work for years to come. Please discuss with your attorney the best way to create a plan that's in line with your goals and needs.

Benefits to You

A gift in your will or by beneficiary designation not only enables our community to continue advancing God's work, but also:

- Costs you nothing now
- Can be changed at any time for any reason
- Can reduce or eliminate taxes depending on the asset used



Meaningful Ways to Leave a Legacy

Gift in a Will or Trust

You can include a gift for the Archdiocese of Chicago, or one of our parishes, schools or ministries, in your will or living trust by:

- Designating a specific dollar amount or asset, such as securities or sale proceeds from real estate.
- Giving a percentage of your estate.
- Leaving a residual gift that is made after all other debts, expenses and other bequests to loved ones are made.

Sample Language for a Gift in Your Will

For an unrestricted gift:

"I give *[insert specific dollar amount or percentage of net or residuary]* to The Catholic Bishop of Chicago, Tax ID #36-2170826, a corporation sole located in Chicago, Illinois, to be used for the general charitable, religious, and educational purposes of the Archdiocese of Chicago."

For a gift to a parish, school or ministry:

"I give *[insert specific dollar amount or percentage of net or residuary]* to The Catholic Bishop of Chicago, Tax ID #36-2170826, a corporation sole located in Chicago, Illinois, to be used for the benefit of *[insert name of parish, school, or ministry]* located in *[insert city]*, Illinois. However, if *[insert name of parish, school, or ministry]* ceases to exist in its current form, then to the new *[parish or parishes/school/ministry]* erected in its stead."

Gift by Beneficiary Designation

You can give the Archdiocese of Chicago all or a percentage of your financial accounts. Some of these assets, which are gifted through a beneficiary designation rather than through your will, include:

- Retirement plan funds
- Life insurance policies
- Certificates of deposit, bank and brokerage accounts and other financial accounts
- Donor-advised funds

To make any of these gifts, contact the financial institution that administers each account and request a change of beneficiary form. Often, you can simply log on to your online account to update your beneficiaries.

Because we are tax exempt, 100% of your gift will support our work, and it will come to us directly with no need to pass through a probate process. You will need our legal name and tax identification number.

Gift Planning Information

Legal Name: The Catholic Bishop of Chicago
Address: 835 N. Rush Street, Chicago, IL 60611
Tax ID: 36-2170826

If you decide to support our Catholic schools, parishes and ministries by including a gift to the Archdiocese of Chicago in your will or by beneficiary designation, we hope you will let us know. Sharing your intention is the best way to ensure that we receive the gift you have planned for us. We are best able to honor your wishes when we know of them in advance.

This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice or obtain the services of another qualified professional. © 2022 MarketSmart | Tax ID: 36-2170826

ARCHDIOCESE OF CHICAGO



Stewardship and Development
835 North Rush Street
Chicago, Illinois 60611
tel 312.534.7959
archchicago@archchicago.org

We're here to help.

You can also visit our legacy website at
myimpact.archchicago.org.