



Planned Giving

Your Legacy Helps Prepare Students for High School... and Heaven

Did you know that you can create a legacy by remembering the IMS schools in your will, trust or estate plans?

Planned giving encompasses a variety of ways that gifts can be made from accumulated resources. It usually involves financial or estate planning; however, it is not reserved for the wealthy.

Become a Member Yourself

When you inform us that you intend to include the IMS schools in your will or estate plan, as a charitable beneficiary of your retirement plan, life insurance or other assets, you become a member of **The Legacy Society**.

The Legacy Society recognizes and honors the generosity of those who are leaving a legacy for future generations.

Contact Us to Get Started Today!

To learn more about making a planned gift in support of the IMS schools, please contact Tara Basile, IMS Director of Development, at 610-200-5100, Ext. 114, or tbasile@independencemissionschools.org.



Thoughts from a current member of The Legacy Society

Miss JC, a graduate of St. Vincent's Catholic School (now DePaul Catholic School), is happy to support the last Catholic school in Germantown and wants the children growing up in her old neighborhood to have the same excellent education that she had.

"I wanted to make sure there was always a Catholic school in Germantown," she declares. "So I put DePaul Catholic in my will. It was so easy! And it makes me happy to think that I will play some part in preserving Catholic education for the next generation."

Her gift will be made "in honor of Father Richie Rock, and the Daughters of Charity, where it all began." Since her future gift to DePaul Catholic cost her nothing in this lifetime, JC is happy to be able to continue to make annual gifts in support of DePaul Catholic students today.

"Education is the most powerful weapon we can use to change the world."



15 Reasons to Leave a Legacy...

- > St. Barnabas
- > St. Cyril of Alexandria
- > St. Frances Cabrini
- > St. Gabriel
- > St. Helena Incarnation
- > Holy Cross
- > St. Malachy
- > St. Martin de Porres
- > St. Martin of Tours
- > Our Mother of Sorrows/
St. Ignatius of Loyola
- > St. Raymond of Penafort
- > St. Rose of Lima
- > The DePaul Catholic School
- > St. Thomas Aquinas
- > St. Veronica

What is Planned Giving?

Planned giving is a means by which anyone concerned with the wise use of his or her personal resources makes a considered choice about how they are distributed. In general, planned gifts are made through a bequest in a will or gifts of special assets, such as real estate, stock, life insurance and retirement accounts and can be designated for general funds or endowment.

Types of Planned Giving

- **A Bequest in a Will:** The most common way of making a planned gift is through your will. A bequest in a will can take the form of a set amount of money, a percentage of an estate, a specific asset, a trust or by naming us as a contingent beneficiary.
- **Gifts of Life Insurance:** Life Insurance enables you to "leverage" your gift, ultimately making a much larger gift to us than otherwise possible, by making us the owner and beneficiary (or contingent beneficiary) of a new or existing policy. With this option, the current value of an existing policy, as well as any contributions, become tax deductible.
- **Charitable Trust:** You establish a trust from which you and/or other beneficiaries receive variable annual payments for life and/or a term of years. At the end of the term, the remainder of the trust assets go to the school for the purposes you designate.

