



CATHOLIC LEGACY
SOCIETY

The Catholic Foundation of the Diocese of Colorado Springs, Inc.

228 N. Cascade Avenue
Colorado Springs, CO 80903
(719) 866-6518 Fax: (719) 866-6530

SAMPLE BEQUEST LANGUAGE

A gift to The Catholic Foundation of the Diocese of Colorado Springs, Inc., in your will or revocable trust proclaims your confidence that we will continue to fulfill our mission and make a difference in the lives of future generations. A bequest:

- Is easy to arrange.
- Will not alter your current lifestyle in any way.
- Can be easily modified to address your changing needs.

RESIDUAL BEQUEST: A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to The Catholic Foundation of the Diocese of Colorado Springs, Inc., located in Colorado Springs, Colorado, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its unrestricted use (or for the support of The Catholic Foundation Endowment Fund, the Diocese of Colorado Springs Endowment Fund, a specific parish endowment fund, or another endowment fund).

SPECIFIC BEQUEST: Naming The Catholic Foundation of the Diocese of Colorado Springs, Inc., as a beneficiary of a specific amount from your estate is easy:

I give and devise to The Catholic Foundation of the Diocese of Colorado Springs, Inc., located in Colorado Springs, Colorado, the sum of \$_____ to be used for its unrestricted use (or for the support of The Catholic Foundation Endowment Fund, the Diocese of Colorado Springs Endowment Fund, a specific parish endowment fund, or another endowment fund).

CONTINGENT BEQUEST: The Catholic Foundation of the Diocese of Colorado Springs, Inc., can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to The Catholic Foundation of the Diocese of Colorado Springs, Inc., the sum of \$_____ (or all or a percentage of the residue of my estate) to be used for its unrestricted use (or for the support of The Catholic Foundation Endowment Fund, the Diocese of Colorado Springs Endowment Fund, a specific parish endowment fund, or another endowment fund).

RETIREMENT PLAN: You may name The Catholic Foundation of the Diocese of Colorado Springs, Inc., as a beneficiary of your IRA or other qualified retirement benefits. To make a charitable gift from your retirement plan, simply enter "The Catholic Foundation of the Diocese of Colorado Springs, Inc." and Federal Tax ID #84-1181613 on the Change of Beneficiary Form available from your plan administrator. Consult with your advisor to determine the benefits you would derive from such a gift.

FOR FURTHER INFORMATION: We would be pleased to work with you and your advisor to determine the gift that best suits your situation and interests. For confidential information on how to create a legacy gift or for additional information on enrollment in the *Catholic Legacy Society* of the Diocese of Colorado Springs, please contact Jamie Crane, Planned Giving Officer, at (719) 866-6518 or jcrane@diocs.org. Visit our website at www.diocsGiftLegacy.org.

Neither The Catholic Foundation nor the Diocese of Colorado Springs are engaged in rendering legal or tax advisory services. The above language is intended solely for general information purposes. For advice and assistance in specific cases, legal counsel should be obtained.