# **Appendix F: Sample brochure and website text**

## Welcome Letter

Dear Friends,

Since *<date of school founding>*, over *<number of graduates>* young people have graduated from *<school name>* and entered society spiritually and academically prepared for their future pursuits. We are proud of our past successes and are continuously striving to enhance our students’ experiences.

At our core, we are a Catholic school committed to providing an education based on Gospel values. Through an emphasis on faith and service, students gain an understanding of their role as a Christian and how to use their abilities for the betterment of society.

[Include if accurate:] Academically, *<school name>* continues to rank among the best schools in the state and the nation in test scores. *<School name>’s* graduation rates, college attendance percentages, and college scholarships awarded are in the highest percentile among public and non-public schools.

I am pleased to introduce to our supportive community an opportunity to invest in the future of *<school name>* through the new planned giving and endowment society, *<planned giving society name>*. The purpose of the society is to provide *<school name>* with financial resources for a viable future. We also wish to recognize many generous members of our community that choose to invest in *<school name>’s*future.

*<School name>* has been blessed with tremendous support from donors and volunteers who give their time, treasure, and talent. I ask that you take a moment to see how your planned gift can play a role in helping *<school name>* welcome new generations of students into our classrooms for faith-filled learning.

God Bless,

*<Name>*

*<Title>*

## Inside pages:

## You Can Leave a Legacy at *<School name>*.

At *<school name>*, we have been fortunate to have many generous supporters who contribute annually. Planned gifts are another way to contribute to the growth of the school and our continuous goal of excellence. Here are some of the most common planned giving or endowment options to consider:

### Bequests

A gift given to *<school name>* that is identified in a will is considered a bequest. This gift helps provide funding for the future of the school. Bequests are one of the simplest types of planned gifts to establish. An attorney is needed to help develop a will.

### Retirement account

Donors can name *<school name>* the full or partial beneficiary of a retirement account such as an IRA. This type of planned gift only requires the donor to complete a simple form with their financial institution.

### Charitable gift annuities

A charitable gift annuity is a contract between a donor and *<school name>*. In this agreement, a donor transfers funds to the school in exchange for a fixed dollar payment for life. To establish a charitable gift annuity, a minimum gift of *<dollar amount>* is required. A charitable gift annuity helps provide income for up to two people and allows individuals to leave a substantial legacy.

### Life Insurance

Life Insurance allows individuals to make small contributions to potentially accumulate significant value. Many types of life insurance policies and payment plans exist. Naming *<school name>* as the beneficiary and owner of a life insurance policy allows a donor to make a substantial gift without disturbing other assets and losing income.

### Trusts

Donors can establish many types of trusts based on their financial situation, and an attorney is needed to assist in this process. A charitable remainder trust (CRT) is a common option that offers donors who are willing to irrevocably commit assets to a Catholic school for an income for life. That income is typically reserved to the donor and his or her spouse, although others can be included. Upon the death of the final income beneficiary, the trust terminates. What remains of the trust principal can be used by the school according to the donor’s wishes. In exchange for this irrevocable planned gift, the CRT donor receives a current income tax deduction based upon the age(s) of the income recipient(s) and the amount of income reserved. Donors can request either a percentage of the trust as revalued annually (a “unitrust” interest) or a specific dollar amount (an “annuity” interest).

### Endowments

To establish an endowment, a minimum amount of *<dollar amount>* must be donated to the school. The principal (corpus) is protected and invested for the future. On an annual basis, the school receives a distribution of the interest income. An endowment can be named to honor or memorialize a family or loved one. All endowments are professionally managed in an investment portfolio.

### Additional options

There are numerous options available for planned giving. We are willing to help individuals and families make a decision that works best for them. Many resources are available to provide assistance during this process.

## Benefits of Planned and Endowment Giving

Making a planned gift or establishing an endowment provides an individual with great satisfaction knowing that the financial future is provided for at *<school name>*. In addition, committing a portion of your assets in support of *<school name>* can provide valuable financial benefits to you during your lifetime:

* Lifetime income
* Increased spendable income
* Income tax deductions and/​or savings
* Capital gains and estate tax avoidance

## <Planned giving society name> Charter Membership

A society has been established to recognize the generosity of those making planned gifts and creating endowments for *<school name>*. Donors who indicate a gift prior to *<date>* will become charter members of the *<planned giving society name>*. All charter members of the *<planned giving society name>* will have their names engraved on a plaque in the *<location>*.

The *<planned giving society name>* is named in honor of *<who and why the name was selected>*. All who support *<school name>* by making a planned gift or establishing an endowment will qualify for membership.

Members of the *<planned giving society name>* will receive *<for example, a medallion of the Virgin Mary>* in honor of their gift. Members will be recognized in various publications and will be invited to an annual recognition event.

We welcome the opportunity to honor those who have invested in the future of *<school name>*. We know that in the coming years, planned gifts will play a major role in the future of our schools.

## Testimonials

Include testimonials that outline their reasons for giving and encourage others to do the same:

“*<School name>* had a profound influence on my life, and I want to ensure future generations of students will have the same educational opportunities I had. The school staff was very helpful and made the process of preparing a planned gift relatively easy. I encourage all who value the education provided at *<school name>* to make a planned gift.”

*<Name and class year>*

*<Planned giving society name>* Charter Member

For additional information contact:

*<School name>*

*<address>*

*<phone number>*

*<Email address>*