

You can make a gift for Catholic Charities of Louisville from your retirement plan, insurance plan or other assets.

### **Retirement funds gift**

To name Catholic Charities of Louisville as a beneficiary of your retirement plan, contact your financial advisor to see whether a change of beneficiary form must be completed.

#### *Benefits:*

- Helping a good cause
- Remove highly taxable assets from your estate by direct beneficiary designation
- Reduce or avoid probate fees
- There is no cost to you now

### **Savings bonds**

If you have bonds that have stopped earning interest and that you plan to redeem, you will owe income tax on the appreciation. Your heirs will only receive a fraction of the value of the bonds. Naming a tax-exempt institution, such as Catholic Charities of Louisville, as a beneficiary ensures that 100 percent of your gift will go toward empowering families in the community.

### **CDs, bank accounts and brokerage accounts**

You can name Catholic Charities of Louisville as the beneficiary of a certificate of deposit, a checking or savings bank account, or a brokerage account.

### **Donor-advised fund residuals**

Final distribution of contributions remaining in a donor-advised fund is governed by the contract you completed when you created your fund. You can name Catholic Charities of Louisville as a “successor” of your account or a portion of your account value.

### **Insurance and Annuities**

To name Catholic Charities of Louisville as a beneficiary of your insurance or annuity, contact your insurance company to see whether a change of beneficiary form must be completed.