



# St. Thomas More Newman Center

## *Guide to Bequests*

Bequests and other testamentary gifts from generous Catholics and friends represents a significant source of financial support for the St. Thomas More Newman Center as we seek to ever advance our mission as a Church to “go and make disciples of all nations.”

You can make a specific gift to St. Thomas More Newman Center of cash, securities, or other assets through your will or trust instrument. You can also designate St. Thomas More Newman Center as the beneficiary of all or part of the remainder of your estate or trust after the payment of estate-related expenses, other bequests, or following the death of a spouse or other primary beneficiaries. Another way to include St. Thomas More Newman Center in your estate plan is to name the parish as a beneficiary of your retirement plan or life insurance policy.

A bequest or trust provision for the benefit of St. Thomas More Newman Center may qualify your estate for an estate tax charitable deduction. Please consult with your attorney.

### **SAMPLE TESTAMENTARY LANGUAGE**

Language like the following may be helpful to your attorney as they assist you in preparing your documentation:

*“I give (\_\_\_\_\_dollars) or (a specific asset) or (all) or (\_\_\_ percent of the rest, residue, and remainder of my estate) to St. Thomas More Newman Center (Non-profit corporation FEIN #43-0810541) in Columbia, Missouri (for its general purposes) or (for the following purpose: \_\_\_\_\_).”*

While unrestricted gifts allow the parish the flexibility to allocate funds to areas of greatest need, you may designate your bequest for a particular purpose or use by a specific program or activity at the parish. In order to ensure that the needs of the parish are met, it is advisable to include the following language with restricted gifts:

*“In the event that at some future time due to changed circumstances, in the judgment of the pastor, it becomes impractical to apply my bequest to the designated purpose(s), the pastor shall make such modifications as will appropriately recognize my interests in coordination with parish priorities.”*

## WHAT'S NEXT?

If you wish to document your bequest intention at this time, please complete the Bequest Intention Form. Such documentation allows the parish staff to appropriately thank and recognize donors whose foresight is ensuring future of St. Thomas More Newman Center. When you make a planned gift to the Newman Center, you will automatically become a member of the *Cor Ad Cor Circle*.



The *Cor Ad Cor Circle* recognizes those who have made an investment in the future of St. Thomas More Newman Center by including a gift to Newman in their will or trust, naming Newman as a beneficiary of retirement assets or life insurance, or some other type of planned gift.

***Cor Ad Cor Circle* members receive the following benefits:**

- Mass celebrated each year for all *Cor Ad Cor Circle* members.
- Inclusion in public listings of the *Cor Ad Cor Circle* (if desired).
- At your passing, you will be remembered at a special memorial Mass, celebrated at Newman.