



GIVE

GIVE THANKS. GIVE BACK. GIVE HOPE.

PLANNED GIVING AT CATHOLIC CHARITIES MAINE



"...CCM's Mental Health and Substance Abuse Counseling services literally saved my life. I'm only 40 now, and I hope to live a good long life, but if not, my 1978 Camaro (which is almost restored) is all theirs!" – RANDY A.

We are here to support you in creating your own unique legacy of faith and hope!

For more information and details on making a planned gift, contact our Development Office today:

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Chief Communications and Development Officer  
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*The information published here is not intended as legal or tax advice, and we encourage you to contact your attorney or tax advisor.*



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IF YOU WANT TO

GIVE

LASTING MEANING

TO YOUR LIFE...





## YOU DON'T NEED TO HAVE MUCH TO LEAVE A MEANINGFUL LEGACY.

Many people think you have to have a lot of money to create a legacy after you die. The truth is any amount of support is appreciated, and in many instances, through planned giving, you can make a gift that costs nothing during your lifetime, but offers substantial rewards for you, your estate, Catholic Charities Maine (CCM) and all those we serve — Maine's neediest and most vulnerable men, women and children — today and for generations to come.



*"I don't have much. I never have. In fact, 30 years ago, I was a welfare mother myself. Catholic Charities helped me way back then and I always said that if I ever got on my feet, that I would give back as best as I could."* — PATRICE B.

*"If our gift can help to eliminate the pain and suffering of just one person after we've passed, then it's all worthwhile."* — ROBERT AND SANDY P.

**At times, the challenges can seem overwhelming — but that's where your gift, however big or small, can make all the difference.**

From helping those struggling with addiction and mental illness, to feeding the hungry, to comforting the elderly and teaching the young, your gift makes it possible for us to help the more than 55,000 of our neediest neighbors we serve each year.

By including Catholic Charities Maine (CCM) in your estate plans, you create a legacy of hope and justice for those most in need here in our state. Through your foresight and generosity, you help build the foundation needed for the future growth and vitality of Catholic Charities, so that we can continue to fulfill our mission to empower and strengthen individuals and families of all faiths by providing innovative, community-based social services throughout Maine.

### The gift that gives back.

In the same way your will gives you peace of mind, knowing you've taken care of your loved ones, planned giving lets you create a permanent testament to the values that matter most to you. Through planned giving, you join a select group of very special people: those who wish to extend their faith beyond their lifetime.



#### When you make a planned gift, you:

**give hope** to those most in need, right here in Maine ...

**give help** directly to programs and services most important to you ...

**give back** to those who have helped you in the past and ...

**give forward** to the future, with a legacy of hope and justice.

### What does your legacy look like?

For some, it's a cash gift, for others, a Camaro — there are many options for planned giving, all of which offer their own rewards... including some potentially substantial tax savings.

The best way to ensure your needs and wishes are met is to discuss planned giving with your financial advisor and determine which of our planned giving strategies is best for you, your loved ones and your estate.

#### Wills, Trusts and Bequests

The simplest way to leave a legacy is to designate a bequest for a specific dollar amount or a percentage of your estate.

For example, one simple option is to include Catholic Charities Maine in your will. All it takes is this one sentence:

*"I give to Catholic Charities Maine, Portland, Maine, the sum of \$\_\_\_\_\_ or \_\_\_\_\_ percent of the rest, residue and remainder of my estate for its general purposes."*

The same sentence can be modified for use when leaving physical items, like stock, real estate, houses, cars, jewelry or artwork, or to support a specific program at Catholic Charities that is close to your heart.

Other planned giving opportunities include:

#### Charitable Gift Annuities

A donation of cash or stock to fund an annuity which in return pays income for a period of years or even for life.

#### Retirement Fund Beneficiary

Designate Catholic Charities Maine as a beneficiary to your retirement plan.

#### Life Insurance Beneficiary

Name Catholic Charities Maine in an existing policy or create a new policy.

#### Charitable Trusts

An irrevocable transfer of cash, securities, or property.

#### Endowments

A permanent fund established to support a specific purpose or to honor an individual or entity.