



THOUGHTFUL GIVING BENEFITS EVERYONE

The chart below lists just a few of the most popular forms of planned gifts that can enable you to leave a significant legacy to Duchesne High School through the Roman Catholic Foundation of Eastern Missouri, while building a more secure future for yourself and your loved ones.



Give a gift that does not affect your cash flow, costing you nothing during your lifetime.

BEQUEST
(a gift through your Will or Trust)

Include a gift of cash, property, or share of your estate through your will or trust.

Eliminate income tax and capital gains taxes. Direct a revocable gift to any purpose you choose.

Give a gift that enables you to pass more of your estate to your heirs.

GIFTS OF RETIREMENT ASSETS

Name the RCF/DHS as the beneficiary of your retirement plan, and pass other less-taxed assets to your heirs.

Avoid up to 70% income tax on your retirement assets.

Give a gift that eliminates capital gains taxes.

GIFTS OF APPRECIATED SECURITIES

Transfer stocks, bonds, or mutual fund shares to the RCF, which will sell them and use the proceeds to endow DHS.

Make a more significant gift; receive an immediate income tax deduction; pay no capital gains tax.

Give a gift that is significant, but does not change your lifestyle.

GIFTS OF REAL ESTATE

With a Retained Life Estate, you deed property to the RCF and continue to use it for life.

Avoid capital gains tax and receive an income tax deduction.

Give a gift that pays you income.

CHARITABLE REMAINDER ANNUITY TRUST OR UNITRUST, CHARITABLE GIFT ANNUITY

Invest your assets with the RCF in a plan that gives you income and the remainder goes to benefit DHS.

Support Duchesne and receive a charitable deduction and an income stream.

Create a significant endowment with the RCF/DHS, without dipping into your capital assets.

LIFE INSURANCE

You transfer ownership of a paid-up life insurance policy to the RCF, benefiting DHS.

Receive an income tax deduction equal to the cash surrender value of the policy.

Give a gift that is later returned to you.

CHARITABLE LEAD TRUST

This trust makes payments to the RCF for a period of years, benefiting DHS with assets ultimately passing back to you.

Remove taxable assets from your estate and deliver immediate tax relief.