



Founded in 1937, the Diocese of Lansing has taken Our Blessed Mother, the Immaculate Conception, as the patroness of the diocese. The Blessed Mother's legacy, from accepting the message from God given by the angel Gabriel to her presence at the foot of the cross, reminds us of her steadfast commitment to God and to His Saving promise to us all. The Catholic Foundation of the Diocese of Lansing honors the legacy of Our Blessed Mother by naming our legacy giving society in her honor.

The Immaculate Conception Society honors those individuals and families who contribute a legacy gift for the benefit of our parishes, schools and/or diocesan ministries and programs. With their partnership, they help write the next chapter of the history of our diocese by joining the leaders of past generations that have grown the Catholic Church in the Diocese of Lansing.

If you have already included a parish, school and/or the diocese in your estate plan, we can immediately enroll you as our newest Immaculate Conception Society member.

To learn more about creating a legacy of giving, contact the Catholic Foundation of the Diocese of Lansing at 517.342.2503 or by email: [pohearn@DioceseofLansing.org](mailto:pohearn@DioceseofLansing.org).



## Immaculate Conception Society Fostering a Legacy of Faith

Witness to  
**H+PE**  
The Catholic Diocese of Lansing



Dear Friends,

Legacy...we all have been given one and, we also have one to leave. We have been left the legacy of our Catholic faith for over 2,000 years from Christ through the apostles, martyrs, saints and every person who has witnessed to our Catholic faith over those years. The bishops, priests and people who founded our diocese and its parishes also have left us an important legacy. We have received this legacy through no effort of our own, but simply because of the love and commitment of those who have come before us.

Every person in the past has left a legacy. How we leave our legacy can take many forms; through our active participation in the life of the Church, our witness, and our generosity. One of the ways we can leave a legacy is to think about the long-term future of our Church's ministry and consider making a legacy gift. Oftentimes, these gifts are made through a simple provision in a will, but also can take many other forms ranging from life insurance to annuities to trust arrangements. Whatever the vehicle, the goal is always the same—to leave a lasting impact on the Catholic Church.

Thank you for taking the time to read this brochure. Whether you already have made a provision for the Church or are considering doing so, we would welcome the opportunity to have a conversation with you about the legacy of faith you will bestow on future generations.

Sincerely yours in Christ,

Most Reverend Earl A. Boyea  
Bishop of Lansing





# Ways to Make a Legacy Gift

## Bequests

A donor designates a gift of cash, securities, real estate or personal property through a will. Bequests are the simplest form of planned gifts and are the largest source of deferred gifts.

### Prospective donors tend to:

- Enjoy the ease of making a charitable gift through a will.
- Want to reduce estate taxes for heirs.
- Leave a legacy with no immediate personal financial impact.
- Be willing to provide appropriate documentation of the bequest.

## Life Insurance

A donor names the diocese, a parish and/or school as owner and irrevocable beneficiary of a paid-up life insurance policy. The donor receives an immediate income tax deduction.

### Prospective donors tend to:

- Enjoy the ease of making a charitable gift through an already existing policy.
- Have grown, financially independent children.
- Be carrying more insurance than their current needs require.
- Want to receive an immediate income tax deduction for the cash surrender value of the policy.
- Want to make a major gift without any major impact on their cash flow.

## Charitable Gift Annuity

A donor transfers cash or securities as an irrevocable gift to the diocese, a parish and/or school. In exchange, the funds are professionally managed and the donor is paid a fixed dollar amount for the rest of the donor’s life. The gift provides a tax benefit for the donor now that can be used for up to five years. These payments back to the donor also have tax advantages up to the donor’s point of life expectancy.

### Prospective donors tend to:

- Like simplicity of a contract.
- Want a larger tax deduction.
- Need supplemental retirement income.

## Charitable Reminder Trust

This irrevocable trust makes payments, either a fixed amount or a percentage of trust principal, to whomever the donor chooses to receive income

(themselves or a loved one, for example). The donor may claim a charitable income tax deduction and may not have to pay any capital gains tax if the gift is of appreciated property. At the end of the donor’s lifetime, the diocese, parish and/or school receives the remaining amount left in the trust.

### Prospective donors tend to:

- Want income for life or a specified term of years.
- Want to see income rise as the trust’s value increases.
- Tolerate some investment risk to provide for growth.
- Be 60 to 75 years old.
- Seek an income tax deduction.
- Have property that has grown substantially in value.

## Charitable Lead Trust

This trust makes payments, either a fixed amount or a percentage of trust principal, to the diocese, parish and/or school during an irrevocable term. At the end of the trust term, the principal can either go back to the donor or to heirs named by the donor.

### Prospective donors tend to:

- Have substantial holdings, no need for immediate income.
- Want to pass assets intact to heirs.
- Want to minimize transfer taxes.
- Have used their lifetime exclusion.
- Be entrepreneurial; family business may be funding asset.
- Hold assets that are expected to appreciate.

*This brochure is for educational purposes only and not considered professional tax or legal advice. Benefits will vary depending on various factors. Please consult your own professional tax and legal advisor for more information.*



# Decision of Faith Guide

The Witness to Hope campaign invites transformational giving that brings profound blessings to those who give in line with their true ability—and great blessing to those who are served by the Church’s expanded ministry. Guided by faith, through personal prayer, those who contribute a legacy gift can inspire similar generosity from other faithful Catholics.

## 3 Spiritual Considerations to Guide Your Generosity

### Gratitude

Be motivated by gratitude to God, making a generous return to the Lord for all the blessings in your life.

### Joy

Give freely rather than from a sense of obligation, knowing that God loves a cheerful giver and that true generosity leads to joy.

### Love

Allow Jesus to fill your heart with His spirit of trust and selfless love for all those served by the Church’s ministry and mission.

To learn more, please visit our website at [www.witnesstohope.net](http://www.witnesstohope.net).