



Catholic Legacy Gift Planning Checklist

1. Discern Your Legacy and Intentions

- ☐ Pray for wisdom and clarity in your planning process
- ☐ Reflect on the spiritual and moral legacy you wish to leave
- ☐ Identify individuals and ministries that have shaped your faith
- ☐ Consider how your gift can support the Church's mission and your Catholic values

2. Organize Your Estate

- ☐ Create a full inventory of assets (properties, savings, retirement plans, life insurance, etc.)
- ☐ List liabilities (debts, loans, mortgages)
- ☐ Gather key documents (titles, deeds, financial statements, etc.)
- ☐ Review all beneficiary designations on retirement accounts, life insurance policies, other assets

3. Establish or Review Legal Documents

- ☐ Last Will and Testament
- ☐ Revocable Living Trust or Irrevocable Trust (required to avoid probate)
- ☐ Durable Power of Attorney (financial)
- ☐ Advance Health Care Directive (medical)

4. Include the Church and Other Charities You Love

- ☐ Consider leaving a gift (percentage or specific amount) to your local parish, diocese, Catholic school or ministry through your will and/or trust
- ☐ Discuss charitable options with an attorney, financial planner or someone at OCF
- ☐ Include the legal name and tax ID of the charitable organization to avoid ambiguity



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5. Faith-Based Giving Vehicles

- ☐ Bequests in a Will or Trust
- ☐ Qualified Charitable Distributions (QCDs) from IRAs, age 70 ½+
- ☐ Donor-Advised Fund (Catholic-managed DAFs available)
- ☐ Life Insurance Beneficiary Designations (consider the Church as full or partial beneficiary)
- ☐ Charitable Gift Annuity (get income today and help the Church tomorrow)
- ☐ Naming the Church or ministry as a contingent or partial beneficiary

6. Share Your Intentions

- ☐ Talk to family members about your faith-inspired plans
- ☐ Prepare a legacy letter or spiritual testament to express your values, prayers and blessings
- ☐ Let your chosen Catholic organizations know about your intentions (optional but encouraged)
- ☐ Include Mass intentions or requests for prayers in your plan

7. Review and Refresh Your Plan

- ☐ Revisit your estate plan after major life events (birth, death, marriage, divorce, retirement) or every 5 years
- ☐ Confirm your wishes are still aligned with your faith and financial situation
- ☐ Keep your documents in a safe, accessible place and inform trusted loved ones

8. Make It a Testament of Faith

- ☐ Offer your gift as an act of gratitude to God for His blessings
- ☐ Consider funding a Catholic scholarship, memorial fund or endowment
- ☐ Remember: 'Where your treasure is, there also will your heart be.' Matthew 6:21