

CREATE A LEGACY OF FAITH, FAMILY, AND GENEROSITY

A GUIDE FOR TAKING THE NEXT STEPS



Our faith teaches us that everything we have is a gift from God: our lives, our loved ones, and our resources. Creating a legacy is not merely about numbers or documents, it is about witness. It is a way to express gratitude to God, provide clarity and peace for our families, and ensure the values we cherish continue to bear fruit for generations.

This guide is designed to help you:

- Begin meaningful conversations with your family
- Reflect on the Catholic values that shape your giving
- Take practical steps toward estate planning
- Consider a planned gift to a Catholic cause you love

PART ONE: TALKING WITH YOUR FAMILY ABOUT FAITH AND GENEROSITY

Starting the Conversation

Family conversations about legacy don't need to be heavy or formal. They can begin with storytelling and listening for where faith and gratitude already show up in your family's life. Invite each person to share, "I was inspired to be generous when...". These stories often reveal more about values than any list ever could.

Naming the Values That Guide You

Our giving flows from what we believe. Take time to reflect, both individually and together, on the values that most shape your life.

You might ask:

- Where have I seen God at work in my life?
- What lessons about faith do I hope the next generation carries forward?
- Which ministries or causes reflect those values most clearly?

Catholic values, such as love of neighbor or dignity of the human person, may surface naturally. Notice what you hold in common and respectfully acknowledge where differences exist.

Listening for Shared Purpose

The goal of these conversations is not agreement on every detail, but understanding. Listening well builds trust and creates space to talk about future plans with clarity and peace.

Before moving to action, consider asking:

- What impact do we hope our giving makes?
- Which needs feel most urgent — now and in the future?
- How might our faith guide those choices?

PART TWO: FROM VALUES TO ACTION

Taking a First Step Together

Generosity grows through practice. Some families find it meaningful to:

- Make a gift together to a cause aligned with shared values
- Invite each person to name a ministry they care about
- Revisit these conversations over time rather than treating them as one-time events

These moments help faith and philanthropy become lived experiences.

PART THREE: ESTATE PLANNING AS AN ACT OF LOVE

A Faith-Filled Perspective

Estate planning is a necessary legal task, but it is also an expression of care. Thoughtful planning can:

- Provide for loved ones
- Reduce confusion and stress
- Reflect your faith and values clearly
- Support the Church and ministries that have shaped your life

Many Catholics find peace in knowing their wishes are clear and their stewardship continues beyond their lifetime.

Essential Planning Tools

A complete plan typically includes:

- A current will or living trust
- Beneficiary designations aligned with your intentions
- Powers of attorney for financial and healthcare decisions

Professionals such as attorneys, financial advisors, and accountants can help ensure your plans are sound and aligned with your values.

PART FOUR: EXTENDING YOUR LEGACY THROUGH PLANNED GIVING

Why Consider a Planned Gift?

A planned gift allows you to support a Catholic cause you love while still caring for yourself and your family. These gifts are often flexible, revocable, and may provide tax advantages.

Planned gifts allow you to say *“This mattered in my life and I want it to matter for others, long into the future.”*

Ways to Make a Planned Gift

Common options include:

- Including a Catholic organization in your will or trust
- Naming a Catholic ministry as a beneficiary of a retirement account or life insurance policy
- Making gifts that provide income or other benefits, sometimes during your lifetime, like Charitable Gift Annuities, Charitable Remainder Trusts, or Charitable Lead Trusts.

You can learn more about planned giving options at thecfgp.mygiftlegacy.org or by scanning the QR code.



PART FIVE: YOUR NEXT STEPS

You don't need to do everything at once. Consider choosing **one next step**:

- Schedule a conversation with your family
- Reflect prayerfully on your legacy goals
- Review or update your will
- Speak with a trusted advisor
- Explore making a planned gift to a Catholic cause close to your heart

Each step builds upon the last.

A FINAL REFLECTION

Jesus reminds us that where our treasure is, there our heart will be also. Creating a legacy is an opportunity to align our hearts, our faith, and our resources — and to pass that alignment on as a gift.

May your planning be guided by wisdom, rooted in love, and filled with hope.

MY STORY OF FAITH AND GENEROSITY

A reflection for individual prayer or journaling

Our relationship with generosity begins long before we ever make a gift. It is shaped by people, experiences, and moments when God's presence became real to us.

Take a few quiet moments to reflect and write.

1. People and moments that shaped me

- Who helped form my faith?
- Who modeled generosity or service for me?

2. Where I have seen God at work

- When have I felt especially grateful for God's blessings?
- When have I been called to trust, give, or serve?

3. What I hope others remember

- When I think about my life, what values do I hope people recognize?
- How do I want my faith to be reflected through my actions?

NAMING THE VALUES THAT GUIDE MY GIVING

For individuals or families

Our values shape not only how we live, but how we give.

Select or write down the areas that resonate most with you, then choose your top three.

- Life and Dignity of the Human Person
- Call to Family, Community, and Participation
- Rights and Responsibilities
- Option for the Poor and Vulnerable
- The Dignity of Work and the Rights of Workers
- Solidarity
- Care for God's Creation
- Commitment to peace
- Other:
- Other:

My top three values are:

1. _____
2. _____
3. _____

Reflection questions:

- Where do I see these values lived out in my life right now?
- Which causes or ministries reflect these values most clearly?

ENVISIONING OUR IMPACT

Moving from values to purpose

On a scale or through reflection, respond to the following:

My giving tends to focus on:

Immediate needs Long-term impact

Supporting local ministries Supporting broader mission work

Helping individuals Strengthening institutions

Reflection questions

- What needs feel most urgent to me right now?
 - What impact do I hope my generosity will have years from now?
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Reflection questions

- Which Catholic parish, ministry, or cause has been most important in my faith journey?
 - How has this organization shaped my life or my family's life?
 - Why would I want to see this mission continue for future generations?
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Considering a legacy gift

- Is there a ministry I would like to include in my estate plans?
- Would I like to learn more about simple planned giving options?

Yes

Not yet

I already have plans in place