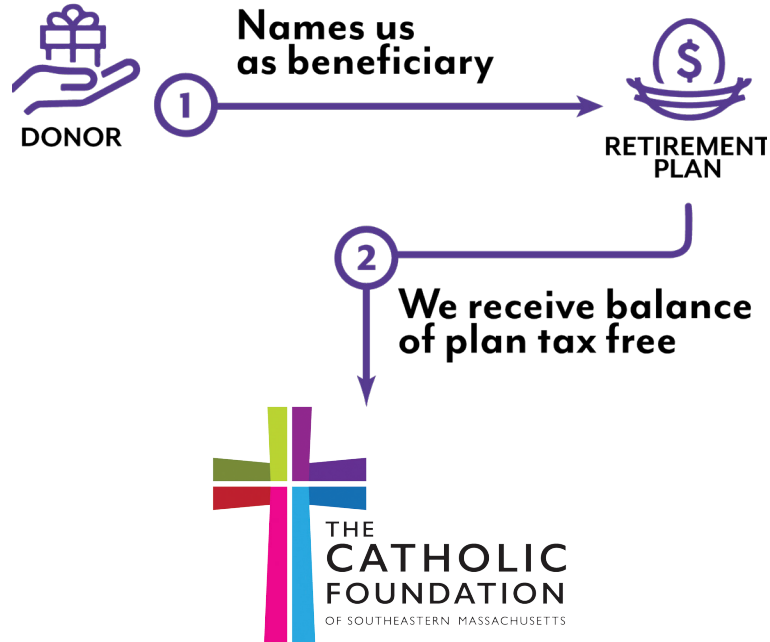




· DIOCESE OF FALL RIVER ·
INSPIRED BY THE SOUL OF CHRIST TO LEAVE A LEGACY OF FAITH

GIVING FROM YOUR RETIREMENT PLAN

Your IRA can be taxed up to 70% if passed on to heirs, but there is no tax when it is used to make a charitable gift to the Catholic Foundation of Southeastern Massachusetts for the benefit of the Diocese of Fall River including its parishes, Catholic schools, and Catholic organizations.



HOW IT WORKS

- Name or designate The Catholic Foundation as a beneficiary of your IRA, 401(k), or other qualified retirement plan.
- Leave your assets to your heirs, your IRA to The Catholic Foundation and nothing to the IRS.
- Important! Please tell The Catholic Foundation about your gift. Your plan administrator is not obligated to notify us. So if you don't tell us, we may not know to honor you for your gift.

BENEFITS

- Continue to take regular lifetime withdrawals.
- Maintain flexibility to change beneficiaries if your family's needs change during your lifetime.
- Your heirs avoid double taxation and may receive an estate tax deduction.

For more detailed information on making a gift to the Catholic Foundation for the benefit of the Diocese of Fall River, please contact us so that we can assist you through every step of the process.

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