

# Giving to St. John Neumann is as easy as 1-2-3!

## Simple steps to making a Planned Gift

### 1. What do I want to accomplish with my gift?

Decide what ministry you wish to benefit. *What mission, activity, or focus area of St. John Neumann parish is most meaningful to you?*

### 2. What is an acceptable gift?

#### Liquid Assets

- Cash
- Stocks
- Securities
- Real Estate
- Personal Property

#### Legacy

- Bequest
- Life Insurance Policy
- Retirement Plan
- Estate

### 3. How do I make my gift?

#### Endowment

- Make a gift to our existing Capital Endowment Fund which supports the capital needs of our parish
- Make a gift to our existing Ministries & Programs Endowment Fund which supports those needs of our parish
- Create your own endowment with at least \$10,000
- You decide how funds are used at St. John Neumann; or you name the specific beneficiary(ies)

#### Gift Annuity

- Opening gift sets pay-out amount, no additional gifts can be made.
- Fixed, guaranteed lifetime income for one or two lives
- Income beneficiary must be 65+
- Minimum gift is \$10,000
- Liquid asset gifts only
- Residual balance transfers to the St. John Neumann Endowment Funds or special fund that you have established.