

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?

1. Liquid Assets

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

OR

2. Legacy

Name St. John Neumann as beneficiary of a:

- Life Insurance Policy
- Retirement Plan
- Estate
- Bequest

3. How do I make my gift?

Endowment

- Make a gift to our existing Endowment Fund which supports the capital needs of our parish.
- OR create your own endowment with at least \$10,000
- You decide how funds are used
- 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 transferred transfers to the St. John Neumann Endowment Fund or special fund that you have established.