



SOAR!

Support Our Aging Religious

LEGACY SOCIETY

Your legacy
can be a
gift forever.



PO Box 96409 | Washington, DC 20090-6409



Leave a Lasting Legacy

The SOAR! Legacy Society recognizes and thanks those who share our commitment to aging religious and have remembered SOAR! with a planned gift. There is no minimum gift required. Every gift and every donor is deeply appreciated.

As a member of the SOAR! Legacy Society, you will be acknowledged for your kindness toward and dedication to the future care of aging Catholic Sisters, Brothers and Priests through a series of membership benefits:

- special mention in the Winter edition of *SOAR! Notes*
- recognition at SOAR! events
- remembrance in the daily prayers and gratitude of the religious congregations helped by this gift

Every gift counts. Every gift makes a difference. Every gift expands your legacy of love.



Some basic facts about Wills.

- With a will you get to decide who will inherit your estate, which includes not only property, bank accounts and stocks, but things like jewelry, coin collections, and other valuables.
- After providing for your loved ones, a will can provide assets to your favorite charity and be used to continue the work of a good cause.
- Your will is private and can be changed by you at any time, so there is no downside to writing a will right now.
- A bequest through your will does not affect your assets during your lifetime.
- Your attorney and financial advisor can walk you through the process with ease.
- You can and should review your will periodically to be sure it still reflects your wishes.





How can I make a gift to SOAR!

- **Will or Living Trust:** This is the easiest way to make a gift to SOAR! After providing for your beneficiaries, you can include a charitable gift for a specific amount, a percentage of your estate, or the remainder or “residue” of your estate.
- **Life insurance:** You can make a planned gift of life insurance by making SOAR! the beneficiary on your policy. This will make your premiums tax deductible.
- **Retirement accounts and bank accounts:** By making SOAR! the beneficiary or specifying a set amount, you can realize financial benefits now through tax deductions.
- **Stocks, bonds or securities:** When you donate securities to SOAR! you will receive a tax deduction for their current value. If the stocks have increased in value, a charitable donation will allow you to avoid paying capital gains tax.



Sample Bequest Language

Percentage:

"I give, devise, and bequeath to SOAR! (Support Our Aging Religious, Inc.) of Washington, DC, ___% of my estate."

Specific Dollar Amount:

"I give, devise, and bequeath to SOAR! (Support Our Aging Religious, Inc.) of Washington, DC, \$_____."

Residue:

The portion of your estate after specific bequests to your family and loved ones have been distributed is referred to as "residue."

All "residue" of my estate, including real and personal property, I give, devise, and bequeath to SOAR! (Support Our Aging Religious, Inc.) of Washington, DC."

Our legal title is Support Our Aging Religious, Inc. Our Tax ID number is 52-1485481.

Please consult your professional legal or tax advisor when preparing estate plans. Staff and volunteers of SOAR! cannot provide legal or tax advice.

**For more information, contact
Sister Kathleen Lunsmann, IHM
President of SOAR!,
by calling 202-529-7627 or
return this confidential reply form.**