



SOAR! NEWS

SPRING 2007 NEWSLETTER

SOAR!'S LARGEST SINGLE DONATION

On 9 March 2007, Terry Stratton, the attorney who oversees the trust estate of Mr. H. Farrell Gilmore, called the SOAR! office. He said that he would be sending to SOAR! a check in the amount of \$302,750.00 from the estate of Mr. Gilmore. Startled, Mr. Stratton had to repeat the amount. We needed to know more about this generous man.

One of his friends, David Maas of San Diego, California, said that "Gil was a wonderful man, a devoted Catholic, and a hard worker. He had great stamina and was very generous." We thank God for the blessing of "Gil".

Mr. Gilmore's talents and endurance are reflected in the obituary reported in *The Desert Sun*, May 7, 2005, B7:



H. Farrell Gilmore
1913 – 2005

May He Rest in Peace

H. Farrell Gilmore noted advertising executive and WWII naval officer died in Palm Springs on May 1st 2005.

Mr. Gilmore was born in Santa Monica, CA and was raised in Chicago. He attended Catholic Prep school in Michigan and university in Chicago. During WWII he was the commander of a patrol vessel in the Aleutian Islands.

In the 1950's, Mr. Gilmore was a Senior Vice President at Ted Bates advertising agency in New York City and was a major innovator during the golden age of advertising.

Upon retirement, he and his long time companion B. Clancy operated the Mill Garth Inn located in Amagansett, New York. They divided their time between New York and their winter home in Palm Springs.

SOAR! LEGACY GROUP

John Fialka, board member

Because of his generosity, Mr. Gilmore becomes the first member of the new SOAR! Legacy Group, a platform designed to help others consider and make larger gifts to meet the needs of aging religious. These gifts go directly to religious orders without the usual overhead costs that encumber most charitable giving. Often they provide advantageous tax benefits to you and your estate. They may be vehicles for you to memorialize loved ones or to keep alive the memory of a favorite Catholic religious whose example helped shape your life.

SOAR!, as you may know, is the pioneer in this field, having given over \$7 million to the many needs of retired religious since our founding in 1986. This year we have given over \$600,000 to 43 religious orders in 23 states and Puerto Rico.

Unfortunately, our job is not done. At present, the average age of a Catholic sister, for example, is 73 years. The resulting strains on religious orders are great as they confront competing demands and limited resources. Many of our donors--those who remember the lifetime-lasting gifts that religious men and women have given us—are nearing or entering retirement age themselves.

There is opportunity here. SOAR! has built up its annual income from small donations and the proceeds of annual dinners to the point where our overhead costs are covered. That means that if you decide to make a larger gift to SOAR!, nearly all of it will go directly to the most pressing daily needs of retired religious.

You can make a bigger impact by giving SOAR! a large gift, such as outright cash, a bequest in your will, or a revocable living trust. At the same time, you can gain tax benefits that protect your estate. Sometimes as much as half an estate can be eroded by taxes at your death unless you and your lawyer have done careful estate planning, which usually involves a strategy of making gifts.

The SOAR! Legacy Group is a tool that will help guide your way. In our annual grant application process, we get requests for help from most of the religious orders in the United States. SOAR! tries to spread its money out to meet the most pressing needs, but that leaves many major project requests unfilled.

By becoming a member of the Legacy Group, you can take on one of these projects yourself. For example, many Catholic sisters live in convents that have unreliable elevators or none at all. Elderly nuns often live on upper floors, so that when the elevator breaks down or there is no elevator, crises may arise. Delivery of food and services, and trips to the hospital or doctor may require heroic efforts.

With a \$30,000 gift, you can be the hero. That's about what SOAR! has been paying to help install or repair elevators. Other calls for help from SOAR! include the following: vans equipped to carry wheelchairs, which cost \$30,000; a therapeutic bath and lift, which costs \$15,000; renovating a monastery to care for Alzheimer patients, which can cost \$30,000 or more.

By joining the Legacy Group, you will be notified of opportunities to make such gifts. Or you can determine the level of your gift and leave it to SOAR! to pick the situation with the most pressing need. When a gift is complete, we will memorialize the donor or family member or a specific nun or brother you wish to remember with a plaque and enrollment in SOAR!'s special Legacy Group website.

Following Mr. Gilmore's example, your involvement will help us encourage others to step up to the plate. Your lawyer can show you how to maximize your giving to SOAR! and minimize tax impacts on your earned money.

The bottom line for this appeal is stark and simple: If you are among the millions of people who graduated from a Catholic high school or college, or if you have benefited from Catholic hospitals, there will never be a better time for you to give back to the people who built and ran these institutions.

The memory of those who ran their lives without a bottom line--because they spent a lifetime giving to others--will shine on through you.

THREE BASIC ESTATE PLANNING TOOLS

A gift of cash or appreciated securities

Such gifts can result in tax deductions and avoidance of capital gains taxes.

A gift through your will

By bequeathing a certain dollar amount or a percentage of the residue of your estate to pass to SOAR! at your death, you can reduce estate taxes.

A gift through a revocable living trust

This gift, used in estate planning, can reduce the amount of an estate that is subjected to estate taxes.

For more information about the SOAR! Legacy Group, contact Sister Patricia Sullivan 202-529-7627 or visit our website: www.soar-usa.org.

2006-2007 SOAR! Grant Awards

California

Sisters of the Company of Mary, Tustin ~ *Elevator*
Sisters of Notre Dame of Los Angeles, Thousand Oaks ~ *Medical and Geriatric Equipment*
Sisters of Social Service, Encino ~ *Closed Circuit Television Capability*

Connecticut

Holy Family Monastery – Retreat, West Hartford ~ *Updated Kitchen Equipment*
School Sisters of Notre Dame, Wilton ~ *Light Oil Burners*

Delaware

Capuchin Province of the Stigmata of St. Francis, Wilmington ~ *Handicapped Accessible Renovations*

Florida

Christ the King Monastery of St. Clare, Inc., Delray ~ *Roof Repair*

Illinois

Benedictine Sisters of the Sacred Heart, Lisle ~ *Window Replacement*
Missionary Sisters of St. Charles Borromeo, Melrose Park ~ *Sprinkler System*
Sisters of St Francis, Joliet ~ *Electric Hospital Beds*

Indiana

Sisters of St. Benedict, Ferdinand ~ *Call System*

Kansas

Benedictine Sisters, Atchison ~ *Infirmity Renovations*

Louisiana

Order of St. Benedict, St. Benedict ~ *Generators*
Society of St Teresa of Jesus, Corrington ~ *EMERGENCY - Katrina Relief*

Maine

Servants of the Immaculate Heart of Mary, Saco ~ *Handicapped Accessible Bathroom Renovations*

Maryland

Sisters of Mercy, Baltimore & Mission Helpers of the Sacred Heart (The Villa), Baltimore ~ *Heating and AC System Upgrade*

Massachusetts

Cistercian Nuns, Wrentham ~ *Medical Equipment*
Franciscan Monastery of Saint Clare, Jamaica Plain ~ *Electric Hospital Beds*
Little Sisters of the Poor of Greater Boston, Somerville ~ *Therapeutic and Medical Equipment*
Missionary Franciscan Sisters, Newton ~ *Handicapped Accessible Shower Facilities*

Missouri

Ursuline Provincialate, Crystal City ~ *Generators*

New Hampshire

Sisters of the Holy Cross, Manchester ~ *Elevator*

New Jersey

Sisters of St. Dominic, Caldwell ~ *Chapel Renovations*

New York

Dominican Sisters of Amityville, Amityville ~ *Elevator*
Maryknoll Sisters of St. Dominic, Inc, Maryknoll ~ *Whirlpool Tub*
Brothers of the Holy Cross, New Rochelle ~ *AED Machine and Cost of Training*
Ursuline Sisters of Tildonk, Jamaica ~ *Handicapped Van*
Sisters of Mercy Rochester, Rochester ~ *Fire Door and Annunciator Panels*
Sisters of St. Joseph, Buffalo ~ *Generators*

North Dakota

Benedictine Sisters of Richardton, Richardton ~ *Medical Equipment*

Ohio

Sisters of Notre Dame de Namur, Cincinnati ~ *2 Therapeutic Baths with Lifts*
Ursuline Convent of the Sacred Heart, Toledo ~ *New Roof over Kitchen Area*
Sisters of Notre Dame, Chardon, ~ *Walk-in Tub*

Pennsylvania

Sisters of St. Francis of Millvale, Pittsburgh ~ *Electric Hospital Beds*
Carmel of the Assumption, Latrobe ~ *Elevator*

Puerto Rico

School Sisters of Notre Dame, Gurabo ~ *Infrastructure Repair*

Texas

Society of St Teresa of Jesus, San Antonio ~ *Grave Sites*
School Sisters of the Third Order of St. Francis, Panhandle ~ *Infirmity Renovations/Upgrades*

Washington

Our Lady of the Rock, A Benedictine Monastery, Shaw Island ~ *Roof Replacement*

West Virginia

Sisters of the Visitation of Holy Mary, Wheeling ~ *Upgrades to Boiler*

Wisconsin

School Sisters of St. Francis, Milwaukee ~ *Communal Bathrooms Renovations*
Sisters of St. Joseph of the Third Order of St. Francis, Stevens Point ~ *Building Renovations*



The White House Approves of New Charity Legislation

The Pension Protection Act of 2006, signed into law on 8 August 2006 allows for donors over the age of 70½ to withdraw up to \$100,000 from their individual retirement accounts (IRAs) tax free if they give that money directly to charity. Discuss with your lawyer how you can take advantage of this new tax incentive to help support the mission of Support Our Aging Religious (SOAR!). The provision is only in effect for 2006 and 2007 tax returns.

In 2006, 57 religious congregations in 23 states and Puerto Rico applied for grants, requesting over \$1 million. Thanks to the generosity of our friends and donors, 43 congregations received grants totaling more than \$600,000!

Your contribution, small or large, will help in the award of more grants.

SOAR! News

Published by Support Our Aging Religious, Inc. (SOAR!)

Contributors: John Fialka; Sr. Patricia Sullivan, RSM & Deborah Vornbrock

Printed by Mays Mission for the Handicapped www.maysmission.org

Non-Profit Org
U.S. POSTAGE
PAID
Heber Springs, AR
Permit No. 26

SOAR!
Support Our Aging Religious
900 Varnum Street, NE
Washington, DC 20017