



May we enroll you in the SOAR! Legacy Society?

- ☐ Yes, I have included SOAR! in my will or estate plans. Please enroll me in the SOAR! Legacy Society.
- ☐ You may use my name in Legacy Society publications.
- ☐ Please keep my name confidential.
- ☐ I am considering a legacy gift to SOAR! Please contact me.

Name(s)

Address

City

State

Zip

Phone

Email Address

- ☐ Please send me a FREE copy of the SOAR! Inventory and Planning Guide.

Scan the QR code to receive your FREE digital copy.



PLEASE COMPLETE THIS FORM. TEAR ALONG THE PERFORATION AND MAIL



About SOAR!

Established in 1986 by a group of committed lay people, SOAR! raises funds and awards grants to help aging Catholic religious Sisters, Brothers, and Priests live with dignity and grace. The generosity of our donors provides practical assistance that ensures the safety and comfort of aging religious across the United States.



PO Box 96409
Washington, DC 20090-6409
www.soar-usa.org



Your legacy can be a gift forever.





Important Facts about Wills

- Without a will, your state decides who inherits your estate, regardless of your personal wishes. Your estate includes your property, investments, jewelry, and anything else you own of financial or personal value.
- With a will, *you* decide who inherits your estate.
- Through your will, you can provide for your loved ones and contribute assets to the organizations and causes that matter most to you.
- You can also choose an executor, someone you trust, to manage the distribution of your estate.
- Your will is completely confidential, and you can change it at any time.
- When you make a bequest, it does not affect your assets during your lifetime.
- Your attorney or financial advisor can help you create a will that meets all your needs and desires.

Sample Language for Your Bequest:

To leave a percentage of your estate:

"I give, devise, and bequeath, to SOAR! (Support Our Aging Religious, Inc.) of Silver Spring, Maryland, _____ % of my estate."

To leave a specific dollar amount:

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

To make a residual (or residuary) gift:

(The term "residue" refers to the portion of your estate that is left after all your other requests have been fulfilled.)

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

The SOAR! Legacy Society recognizes and thanks those who share our commitment to aging religious women and men through a planned gift.

More ways you can support SOAR!

LIFE INSURANCE. You can name SOAR! as the beneficiary of a life insurance policy. When you do this, your premiums may be tax-deductible.

RETIREMENT ACCOUNTS. When you make a gift directly from an IRA or certain types of accounts, your contribution could be tax free.

STOCKS, BONDS, OR SECURITIES. Donating these types of instruments to SOAR! may help you avoid significant taxes on the profits from your investments.

PLEDGES. You can pledge a donation to SOAR! and then make payments toward the full amount of the pledge.

For more information, contact Elizabeth Góral-Makowski at emakowski@soar-usa.org or call (202) 529-7627.



OUR LEGAL TITLE IS:

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

Please consult your legal professional or tax advisor as you prepare your estate plans. SOAR! staff cannot provide legal or tax advice.