

COMMON QUESTIONS ASKED ABOUT LEGACY PLANNING

How do I get started with a Legacy Plan?

The first step is to consult with a financial planner or estate lawyer. They can help you determine what assets you have and help you establish the proper investment vehicles. If you already have a financial planner or an estate lawyer you have already completed the first step.

Isn't Legacy Planning for wealthy people with large estates?

No gift is too small to make a difference.

Am I too young or too old to start Legacy Planning?

No matter your age it is important to have some type of plan. Having a plan in place will ensure that your assets go where you want them to go, not to where the state determines they go. A plan will ensure that your wishes are carried out and it will help your loved ones during a difficult time.

Can I leave money to my family, Church of the Risen Savior and other charities?

Yes, as long as you have a plan that lays out your wishes, you can leave a lasting legacy to your loved ones, Church of the Risen Savior and other charities.

Is my Legacy Plan adjustable should I change my mind?

Yes, if you change your mind or life situations change, you would just need to contact your financial planner or estate lawyer for help making the changes to your Legacy Plan.

We are not owners of the gifts and resources with which God has blessed us, but merely stewards. We came into the world with nothing and we leave having made some sort of impact. The question is how we distribute the material wealth accumulated during our lifetime – with an awareness of God's presence in our lives.

By making provision for Church of the Risen Savior in your will or estate plan, helps you share your worship traditions and ministries with those who will come after you.

Thank you,
The Legacy Planning Committee

**OUR DOORS ARE OPEN TO ALL.
OUR EUCHARIST IS A CELEBRATION
OF THE RISEN SAVIOR.
OUR CALL IS TO LOVE AND SERVE.**

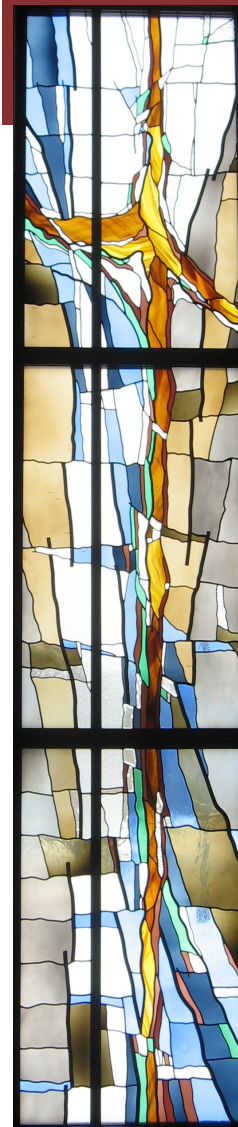
For beneficiary designations:

Church of the Risen Savior

1501 East County Road 42
Burnsville, MN 55306
Phone: 952-431-5222
Fax: 952-431-5221

For additional information please contact:
Parish Administrator
(952) 698-1720

Legacy Planning



*“Keep in mind
the words of
the Lord Jesus
who himself said,
‘It is better
to give than
to receive.’”
Acts 20:35*

Church of the Risen Savior

WHAT IS LEGACY PLANNING

Legacy Planning helps you examine not only your financial and non-financial goals and concerns but it also focuses on the values and legacy you wish to leave behind. Legacy Planning helps you discover ways to use your time, talent and treasure to make a lasting impression on those you love and the causes you believe in.

As Catholics, we believe that all things are gifts from a loving, generous God. We have the responsibility of using these gifts wisely and carefully – as well as sharing them with others – our families and also with those institutions devoted to spreading God's reign on earth. Therefore, we ask that you consider making Church of the Risen Savior a part of your Legacy Plan.

It is important for every person to have a well-designed Legacy Plan. In many cases these plans can help minimize tax liability and maximize how others benefit from your generosity long into the future.



MAKE A LEGACY PLANNED GIFT

Bank or Investment Account

Financial accounts can be a simple and inexpensive way to leave a legacy gift for the Church of the Risen Savior.

Bequests by Will

One of the simplest planned gifts is a bequest through your will in which you designate either a specific dollar amount or a percentage of your estate after other disbursements. In addition to supporting Church of the Risen Savior, it serves as an example to your heirs of the values and ideals you hold dear. A bequest may also reduce the amount of your taxable estate.

Marketable Securities

A gift such as stocks, bonds, mutual funds or other securities is a valuable way to benefit Church of the Risen Savior and for you to receive tax benefits based on the fair market value of the assets.

IRA Beneficiary Designation

Most retirement plans, including 401(k)s and IRA's, are income tax-deferred, meaning that income tax is not paid until the funds are distributed to you in life, or upon your death, therefore these assets can be the heaviest taxed assets in your estate. This taxation makes retirement assets among the most costly assets to distribute to your family.

Naming a non-profit charitable organization such as Church of the Risen Savior as a beneficiary you can avoid that taxation, enabling the asset to pass tax free to the Church. You can also make the Church a percentage beneficiary or a contingent beneficiary of a retirement plan.

Life Insurance

A gift to Church of the Risen Savior of an existing life insurance policy or buying a policy making Church of the Risen Savior the owner and beneficiary.

THE LEGACY PLANNING COMMITTEE OF CHURCH OF THE RISEN SAVIOR
ASKS THAT YOU CONSULT WITH YOUR PROFESSIONAL ADVISORS ON HOW LEGACY PLANNED GIFTS
WOULD FIT INTO YOUR OVERALL PLANS.