

STEWARDING YOUR LEGACY

Sharing & Growing Your Gifts

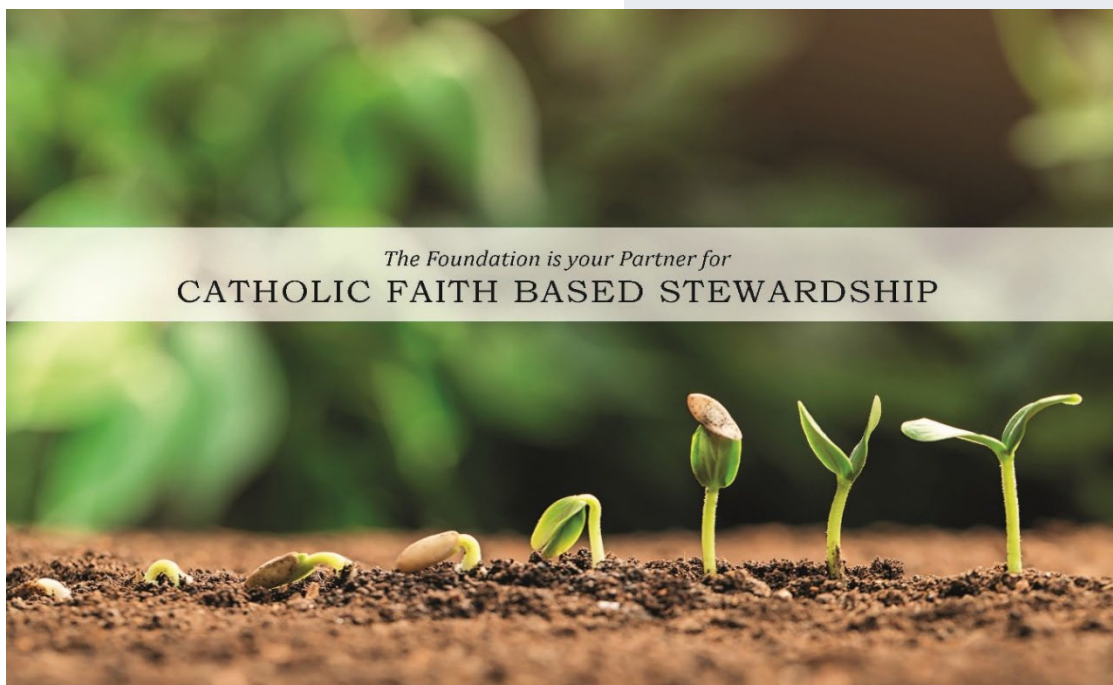
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A MESSAGE FROM THE EXECUTIVE DIRECTOR MAUREEN O'KEEFFE LINDGREN

Happy New Year!

Thank you again for your generosity in 2023. The Foundation received the most gifts since its inception in 2019. Your direct gifts and planned gifts supported the establishment of new endowments, the Seminarian Partnership Program, and Home Mission.

As we move into next year, 2024 is going to be a very exciting year as we celebrate the **100th Anniversary of our Diocese**. This centennial year will allow us to reflect on the generosity of those who came before us and provide opportunities to build a lasting faith-based legacy for the next 100 years.

The mission of The Foundation is to financially ensure a strong and vibrant Diocese for today and years to come. I look forward to sharing specific initiatives with you in the months ahead.

"GOD WAS GUIDING US"

Read how Mary Conlon and George Gentzler were guided in their giving through their IRA QCD. Their love of architecture, and more specifically religious architecture, led them to establish an endowment to support the ongoing development of sacred spaces in the diocese.

For George, the belief that every parish, regardless of its location, deserves a beautiful church building to serve its people is a guiding principle.

[Visit our blog to learn more.](#)



REQUIRED MINIMUM DISTRIBUTION DONATIONS

In 2023 many Foundation donors used their IRAs to make annual donations to their Parish, Endowments, Seminarian Partnership, Home Mission, and other diocesan ministries.

As we step into the financial landscape of 2024, it's crucial to stay informed about regulations that impact retirement savings. One such area is Required Minimum Distributions (RMDs), a mandatory aspect of retirement planning for certain individuals in the United States.

Individuals aged 70½ and older have the unique opportunity to donate all or a portion of their Required Minimum Distribution directly to The Foundation. This proactive approach allows us to distribute the funds across the Diocese in alignment with your specific wishes.

The SECURE Act raised the RMD age to 73, but it did not affect the age requirement for Qualified Charitable Distributions, which remains at 70½.

How it works:

- A check is sent directly from your IRA to The Foundation.
- Most types of IRAs qualify: traditional IRA, rollover IRA, inherited IRA, and inactive SEP and SIMPLE IRAs.
- You, as the donor, can exclude the donated amount from taxable income.

The Foundation is committed to providing flexible gift options that align with your philanthropic goals. If you wish to explore these options further, or if you have any questions, please feel free to reach out to Donna Ashcraft, our Director of Development, at Donna@Foundationdor.org or 919-568-1067.

Note: Given the potential changes in tax laws and financial regulations, it's advisable to consult with a financial advisor to tailor your RMD strategy to your individual circumstances. This proactive approach can help you optimize your retirement income and navigate any changes that may occur in the financial landscape.

INTERESTED IN LEARNING MORE ABOUT ESTATE PLANNING?

As a way to help educate parishioners in their knowledge as faithful stewards of the Lord's gifts, the Foundation of the Roman Catholic Diocese of Raleigh is offering another Estate Planning Webinar on Tuesday February 13th, 2024.

The Webinar will be led by Foundation Staff and a local Estate Planning Attorney, providing an excellent opportunity for parishioners to learn more about what personal planning is and what it involves. Webinar topics include legal steps required in personal planning, understanding wills and trusts, Catholic Advance Medical Directives, Power of Attorney, and an overview of the various charitable vehicles for estate planning.

Click on the graphic below to register:

Catholic Estate Planning WEBINAR

RYAN FLOOD, CAP, FCEP
PLANNED GIVING SPECIALIST
THE FOUNDATION

ANDREW W. BLAIR
ATTORNEY & CPA
PARTNER, POYNER SPRUILL, LLP

13TH
FEBRUARY, 2024

10AM - 11:15AM
ONLINE

THE FOUNDATION
Serving the Catholic Community of Eastern North Carolina

O Lord God, we humbly implore Your blessing upon the Church of the Diocese of Raleigh as we observe this year of celebrating our Centennial. We thank You for sending Your only begotten Son and the power of the Holy Spirit to guide us as we established our Diocese, helping us to acknowledge and celebrate the diversity, and each faith community within our vast expanse. We ask this through Christ the Lord, Amen

DON'T FORGET TO FOLLOW US ON OUR SOCIAL MEDIA PLATFORMS – LINKS ARE BELOW!

