



**THE CATHOLIC FOUNDATION  
OF GREATER PHILADELPHIA**

**10 YEAR  
ANNIVERSARY**

**2013-2023**

# Planned Giving

When you make a planned gift\* through The Catholic Foundation of Greater Philadelphia, you are providing for future support of the missions within the Church that are the most meaningful to you.

As you think about your legacy, CFGP can serve as a helpful resource for estate planning and bequests. If you need help, we are here to assist you at every step. Please contact Chief Advancement Officer Peggy Sweeney at 215-587-5650 or [psweeney@thecfgp.org](mailto:psweeney@thecfgp.org) to get started. Here are the most common planned gifts:

## BEQUESTS

The easiest way to make a planned gift is through a bequest. If you would like to name CFGP in your will or trust, consider using the following text: "I, [name], of [city, state, ZIP], give, devise, and bequeath to The Catholic Foundation of Greater Philadelphia, 2133 Arch Street, Suite 400 Philadelphia, PA 19103 TAX ID 46-1566557 [written amount, percentage of estate, or description of property] for its general charitable purposes."

CFGP has partnered with FreeWill to offer our donors a user-friendly online resource for common estate planning needs. You can create your will for free if you don't already have one and leave support to your favorite Catholic causes. Please see the enclosed flyer for more information about FreeWill.

## STOCKS AND SECURITIES

When you gift stocks and other securities directly to CFGP, you can amplify your impact without taking away from your daily income. In addition, neither you nor CFGP will be taxed on the gains for appreciated assets you donate.

## QUALIFIED CHARITABLE DISTRIBUTIONS

Qualified Charitable Distributions (QCDs), also known as IRA Charitable Rollovers, are the savviest way for individuals age 70½ or older to use their IRAs to maximize their charitable impact.

## OPENING A FUND WITH CFGP

A Donor-Advised Fund is an excellent vehicle to make a planned gift. Please contact us to learn how easy it is to open and use your fund, and to ensure your legacy for future generations.

*\*As always, be sure to consult with an attorney or your financial advisor while making these decisions.*

To learn more about planned giving visit our website CFGP, please scan:

