

*“As generous distributors of God’s manifold grace, put your gifts at the service of one another, each in the measure he or she has received.” 1Peter 4:10*

## **A Christian Will**

**Remembering Your Family of Faith**



**100 Years from now ....  
would someone reading your will  
be able to tell that  
you were a Christian?**

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**Should they be able to?**

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**How?**

If there is any writing that would indicate what are the most important elements in our lives it most certainly should be our Last Will and Testament.

In it we would naturally expect to find mentioned those people – related or unrelated – who for whatever reasons were the most significant people on earth to us. We would likewise expect to find mentioned any institution or organization that was especially significant or important to us in some way.

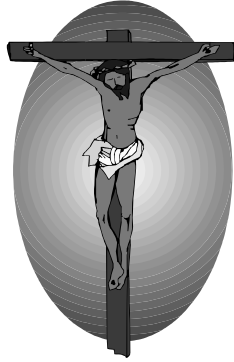
For a Christian it would seem certain that the Church and/or some of its related activities would meet that criterion. If not, something must have gone wrong somewhere, or maybe we just didn't think about it. Whatever the case, now would be a good time to rethink it.

# *A Christian Will*

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*Information you requested concerning  
Bequests to your Diocese and/or Parish*

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## *Remember Your Family*

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Just as you would provide for your own personal family in your Will, you can provide for your Family of Faith. Only with a Will are your wishes known and followed after death.

There are many reasons for having a Will:

1. With a Will you provide for your beneficiaries over and above what may have transferred to them under the laws of the Commonwealth of Kentucky.
2. With a Will if you have any minor-aged children you can name a guardian.
3. With a Will you can provide for the charitable distribution of some of your assets to the Diocese of Lexington, your Parish, or any other charitable program of your choosing.
4. With a Will you can name the person or persons who will carry out the terms of your Will regarding the distribution of your assets.
5. With a Will you are able to plan your estate so as to maximize savings from estate, inheritance and even income taxes. Such planning enhances the assets that you may pass on to your beneficiaries.
6. With a Will your estate will be handled in an efficient and timely manner since the Will reduces the chance of argument among beneficiaries.

Formalizing a Last Will and Testament is an extremely serious undertaking. It is a legal instrument, and one, which will be under the scrutiny of the court, it should always be written with the assistance of an attorney. This insures proper construction and correct wording to achieve your desires and instructions.

***Because a Will reflects who and what is important to you – doesn't it make sense that you remember your Catholic Faith Family in your final statement to the world?***

## *How to make a charitable gift*

Here are a number of ways in which a person may make a charitable gift in his/her Will:

1. You may give a percentage of your estate.
2. You may give a specific amount.
3. You may give part or all of the residual of your estate – that is, what is left after all beneficiaries have received their portions and all debts and taxes have been satisfied.
4. You may specify a gift of certain property, such as real estate, stocks or any tangible personal property you own.
5. You may also make a combination gift arrangement, such as a certain percentage plus the residual.

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You should try to determine whether or not management will be required for any of your real properties and, if so, who will be the manager. Be sure to specifically name your executor and any trustees. Make certain someone knows the location of your Will and the valuable papers concerning your property and other assets.

Keep in mind that you will need to review your Will periodically to update it. Minor changes can be made in a Will by the use of an amendment called a *codicil* to the Will. It also is a document that you need an attorney to complete for you.

***Remember, we are not the owners of our time, talent or treasure but merely the stewards of the gifts God has given us. We must pray that our Lord will help us to wisely manage these gifts during our lifetime so they will be carefully shared with others upon our death.***

## ***SUGGESTED BENEFICIARIES***

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These are just some of the opportunities we have to remember our Family of Faith in our Christian Will. The local Bishop, your Pastor, or someone from the Stewardship, Mission & Development Office will be happy to discuss this with you.

You may select one or more of the following beneficiaries to share in your gift –

1. Bishop of the Roman Catholic Diocese of Lexington for the general purposes of the Catholic Church.
2. The Bishop of the Roman Catholic Diocese of Lexington:
  - a) for formation and related expenses of priests, deacons, lay ministers, and religious to serve the Diocese.
  - b) for the benefit of the missions or needy parishes of the Diocese.
  - c) for assistance to the Catholic educational needs of the Diocese.
  - d) for special and continuing educational needs of priests, deacons, and other ministers after formal education and formation has been completed.
  - e) for the benefit of retired priests, including their housing needs and subsistence.
  - f) for a special program or Department of the Diocese, e.g., family, youth and campus ministries, pastoral services, etc.
  - g) for any of the specific Catholic agencies and institutions within the Diocese, which include Schools, Social Services, Retreat Centers, and other agencies which provide vital services (e.g., shelter, clothing, meals, counseling, etc.) that are planned and offered with the approval and support of the Diocese of Lexington.

3. Your Parish – for the benefit of the Parish as a whole, or for some specific purpose such as elementary school education, or parish endowment funds.
4. Catholic Social Service Bureau, Inc. for use in their operations in general or for some specific program of your choice.

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## **GLOSSARY**

**Will** – the legal and written declaration of a person’s intentions as to the disposal of his/her estate after death.

**Estate** – all the assets owned by a person at the time of his/her death.

**Property** – includes all those things and rights which are the object of ownership. Real property consists of land or any thing attached to or a part of the land, such as a house or other structures. Other property, cash, stocks, bonds, insurance, jewelry and other such things are called personal property. All property owned by a person is said to be his/her assets.

**Intestate** – death without having a legal Will; not disposed of by a legal Will.

**Probate** – to prove in a court of law that an instrument is truly the Last Will and Testament of the Testator.

**Executor** – a person named in the Will designated as responsible for distribution of the property of the testator, the person making out the Will.

**Codicil** – a document modifying, adding to or qualifying a Will and forming an integral part of a Will.

**Forced Portion** – that portion of a person’s estate that is reserved by law for the descendants and cannot be disposed of by Will or Testament.

The Secretariat for Stewardship will assist you in preparing information and lists prior to your visit to your attorney. We can also show you other ways in which you can ensure that your Christian interest and influence will continue on into the future.

**For additional information ----**

**Secretariat for Stewardship  
Attn: Planned Giving  
1310 West Main Street  
Lexington, Kentucky 40508-2048**

**859-253-1993**

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*Neither the Diocese of Lexington nor any of its representatives are engaged in rendering legal or tax advisory services. Persons are cautioned to consult their own advisors on all such matters.*