



LEGACY GIVING NEWSLETTER

A QUARTERLY EDUCATIONAL PUBLICATION OF EWTN

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FALL 2022

IN THE NEXT ISSUE



- **Catholic Estate and Personal Planning Workbook**
- **End of Life Issues**
- **Gifting Real Estate**

Join us for a virtual Catholic Estate & Personal Planning Seminar:

Tuesday Nov. 8, 2022 at 2pm CST

Call (205) 271-4522

or email legacygiving@ewtn.com to register

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EWTN FAMILY MEMBERS SHARE THEIR STORIES

“When I saw it, I grabbed it!”

Charitable Gift Annuity Testimony by *Karen Silva CFRE, FCEP*



Shirley Macaron


Shirley spent her 31-year career in education teaching high school students accounting, shorthand, typing, and other business-focused classes. Now retired, she is devoted to supporting Catholic organizations. “I was born Catholic, grew up Catholic and will die Catholic. I never had children, and don’t have nieces or nephews to take care of, so I want to give to charity,” said Shirley.

Shirley has been a loyal viewer of EWTN for more than a decade. “I’m not much of a TV person, but when I do watch, it is always EWTN. I never change the station,” said Shirley. Since the pandemic, she has watched more EWTN than usual. She enjoys all the programs, but her favorite shows are Daily Mass, special Masses, and EWTN News.

Shirley was excited when she learned from the Legacy Giving Newsletter that EWTN through the National Catholic Community Foundation, offered Charitable Gift Annuities. She was already familiar with this type of giving. Charitable Gift Annuities appealed to Shirley because they gave her a big tax deduction and a good interest rate. She enjoyed that she received fixed payments

for life. She also knew that the remainder would accomplish her charitable giving intentions and benefit EWTN.

According to Shirley, “When I saw it, I grabbed it!” She called Karen Silva, who was able to provide her with an individual gift illustration. The custom proposal provided Shirley with detailed figures that included the amount of the fixed payments based on Shirley’s age as well as estimated tax benefits. Shirley was able to establish her Charitable Gift Annuity within two weeks of her initial call.

Shirley intends to keep giving through Charitable Gift Annuities. New Charitable Gift Annuities may also provide additional tax benefits. Shirley’s hope is that the residuum from her Charitable Gift Annuities will one day continue the evangelization efforts of EWTN to future generations. 

Charitable Gift Annuities have been an effective giving strategy for Shirley. If you want to learn more and determine if a Charitable Gift Annuity could be right for you, please contact the Legacy Giving Program to schedule a no-cost, no-obligation phone call with one of our Gift Planners.

Inspire others by sharing your story with our EWTN Family at (205) 271-4522 or legacygiving@ewtn.com. For more stories, visit www.ewtnlegacy.org.

Your Catholic Faith is Your Legacy

By Robert Michael Way, Esq.



Our guest columnist for this edition of the Legacy Giving Newsletter is Estate Planning Attorney, Robert M. Way, Esq. of Tucson, Arizona. Robert's practice represents clients in trusts and estate litigation, postmortem issues, end-of-life matters, and Catholic faith-based planning, both throughout Arizona and with other attorneys across the United States. Robert is a Byzantine Catholic (Ruthenian Rite), husband and father of eight children.

Glory to Jesus Christ, Glory to Him forever!

What is your legacy? Is it your money, property, or assets?

Indeed, your legacy is your Catholic faith lived for and in Christ (Rom. 6:1-23). Although unknown to many people, it is possible to integrate one's Catholic faith in their estate planning documents.

Wills & Trusts

Wills and Trusts are the bedrock of estate planning which act to appoint an individual to manage an estate at death (or during incapacity); and to distribute property after death to designated individuals. Consider the following Catholic faith-based provisions that may be included in a Will or Trust.

Faith Declarations

1 A "Faith Declaration" can be included in a Will or Trust, as a witness of your beliefs in the Holy Catholic Church and all that She teaches to a spouse, child, and perhaps even to the Court (e.g., when a Will passes through probate). Some individuals may wish to include the date of entering Sacramental Marriage (or for clergy, the date of Ordination) in this Declaration.

Sign of the Cross

2 Similarly, one may begin a Will (the very first line in the document) invoking the Holy Trinity with the words of the Sign of the Cross. Since everything that we do is in relationship with the Holy Trinity, by beginning with the Sign of the Cross, we can change our last Will into a prayer.

3

Forgiveness Provisions

Recall for a moment the words of Our Lord: "If you do not forgive others, neither will your Father forgive your transgressions" (Mt 6:15). Each of us is confronted with relationships where it may be difficult to forgive another, or even ourselves for our own sins. So why not include a provision in a Will or Trust which forgives others and seeks forgiveness? Consider the following:

"From the depths of my heart and soul, I forgive anyone I have hurt consciously or unconsciously, intentionally or unintentionally throughout the course of my life's journey, and I pray that all will forgive me."

4

Tithing from a Spirit of Thanksgiving


Gratitude begins with being thankful for the gift of God's creation, redemption, and sanctification (1 Thess. 5:16-18). Thus, we should all consider giving a tithe of our estate when we die --- by doing so, our gift will be an external sign of our thanksgiving for the covenant of God's love for us through Jesus Christ. And, if you desire to make your charitable gift for a particular purpose, then consider restricting the gift with appropriate language (i.e., This gift is restricted for repairs to the Church roof).

5

Gregorian Masses

Lastly, think about including a provision in a Will or Trust where you donate a cash gift to a monastery or religious order requesting that the Gregorian Masses (series of 30 consecutive Masses) be offered for the repose of your soul. Many Catholics today have rediscovered the efficacy of the Gregorian Masses as a pious practice for the continued purification of the deceased, and the entire Church Suffering.

Your Estate Plan

So, what will you do next? Find a qualified estate planning attorney who will guide you through the documents you need, and who will work with you to incorporate your Catholic faith into your plan. By doing so, your faith will not be just a part of your legacy – it will be your only legacy. 



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How an EWTN Family Member used Income from the Sale of an Asset to fund a Charitable Gift Annuity

By Ryan T. Flood, CAP®, FCEP



I recently worked with an EWTN Family member who had sold her home in a Western state and moved to a new home in the Southern part of that state. She was looking for a way to further supplement her retirement income and ultimately to make a gift to benefit EWTN. This would be her second charitable gift annuity with EWTN; she established the first one in 2019.

She liked how the gift annuity worked, particularly the charitable deduction she received in the year she made the gift

and the fixed income stream she will receive for the rest of her life. Lastly, she set up direct deposit for her quarterly annuity check. Her funds will be deposited directly into her bank account so she will not have to worry about her checks getting lost in the mail. 

If you would like to learn more about how a charitable gift could benefit you or a loved one, please contact our Legacy Giving Department at (205) 271-4522 or visit us at www.ewtnlegacy.org.



EWTN Welcomes Khayla Jones

Khayla is our Legacy Giving Assistant who provides administrative support to the Legacy Giving Team. Khayla also serves as the initial contact for the Legacy Giving Program to assist our EWTN Family Members and Friends. If you have any questions or would like to schedule a no cost, no obligation meeting or visit with one of our gift planners, please contact Khayla at (205) 271-4522 or kmjones@ewtn.com.

JOIN US

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ONLINE: CATHOLIC ESTATE AND PERSONAL PLANNING SEMINAR



Tuesday, November 8, 2022 at 2PM CST

REGISTER

Call (205) 271-4522 or email kmjones@ewtn.com



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**Meet EWTN's Legacy Giving
Staff**

Meet EWTN's Legacy Giving Staff Ryan Flood and Karen Cullinan Silva



**Ryan T. Flood, CAP®, FCEP -
Director, Legacy Giving Program**

Ryan assists EWTN Family members and friends who are interested in integrating life-transforming charitable giving strategies into their financial, business, or estate plans. Ryan is always prepared to share his more than 20 years of experience through one-on-one meetings or in his popular Catholic Estate and Personal Planning Seminar. You can reach Ryan at (205) 569-2674.



**Karen Cullinan Silva, CFRE, FCEP -
Legacy Giving Officer**

Karen applies her 15 years of professional fundraising experience helping EWTN Family members in the Mid-South, Southwest and Midwest achieve their charitable estate planning goals. Karen is available to help you explore estate planning and charitable giving approaches that align with our Catholic values. You can reach Karen at (205) 734-7142.

You can schedule a meeting with Ryan or Karen by contacting our Legacy Giving program at (205) 271-4522 or by visiting us at www.ewtnlegacy.org

**Contact
Legacy Giving**



(205) 271-4522



legacygiving@ewtn.com