LEGACY GIVING NEWSLETTER

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FALL/WINTER 2023

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Join Our Next Virtual Planning Seminar

Tuesday January 16, 2024
at 12 PM EST / 11AM CST

Call (205) 271-4522
or email legacygiving@ewtn.com
to register.

EWTN Global Catholic Network

Find us online:
www.ewtnlegacy.org

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5817 Old Leeds Road
Irondale, AL 35210

EWTN FAMILY MEMBERS SHARE THEIR STORIES

The Blessing of a Penpal

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

Michael Ham was born in 1990, and by age three, he was watching EWTN. During the Great Jubilee Year of 2000, Michael wrote his first of an estimated 180 letters to Mother Angelica, and Mother wrote back. He wrote to her once a month for 15 years and they developed a great friendship. They shared many things: both had physical limitations, and both suffered in many untold ways. But most importantly, both had a great love for Jesus and the One, Holy, Catholic, and Apostolic Church He founded. It's not easy living in a wheelchair and suffering with the effects of muscular dystrophy, but on some of those tough days, the phone would ring, and Michael's mom would say, "There is someone on the line who wants to speak with you," and it would be Mother Angelica. "Michael, are you behaving yourself?" Mother would sometimes ask. Other times she would call to give Michael a spiritual pep talk or just talk about life. After Mother suffered her debilitating stroke, Michael would still send his monthly letters and the Nuns would read them to Mother while he listened on the phone.

As you can image, one of the saddest days in Michael's life was when Mother passed into eternity. Michael was beside himself. As he fought back tears, he recalled the moment he learned of Mother's passing when he read the message that scrolled along the bottom of the television screen… Mother Mary Angelica 1923-2016. At first, he did not want to accept the news and it took many weeks for the reality to set in. A few years later, Michael's muscular dystrophy worsened, and he also found out that he had cancer in his kidneys. Despite all his earthly trials and suffering, Michael remains focused on his mission. He knows, as St. Paul wrote in Colossians 1:24, "Now I rejoice in my sufferings for your sake, and in my flesh, I complete what is lacking in Christ's afflictions for the sake of His body, that is, the Church." As Michael patiently suffers through his final days on earth, please keep him in your prayers.

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The Blessing of a Penpal *(continued from page 1)*

As a man of modest means, Michael wanted to figure out the best way to make a difference. EWTN's Legacy Giving Team helped him explore a few gifting options, suitable to his situation. He also worked with a local estate planning attorney to finalize the documentation for a transfer of his home through his estate plan. Walking Michael through the process helped him to establish the plan that fit his needs. He now has peace of mind, knowing that his affairs are in order and his charitable intentions will be honored. His gift will be another way to honor Mother's Legacy and the lasting impression she made on him and countless other souls. I asked Michael if we could share his story and he said, "Yes, whatever helps move the mission of the Network. I'm all for it!"

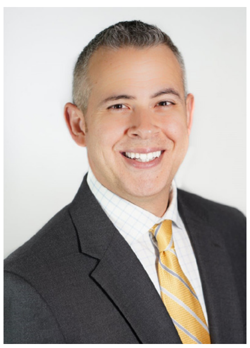
If you would like to learn more about how you can establish a bequest for EWTN or make a gift of real property (real estate), please contact us directly at (205) 271-4522.

Let us know if you are planning a trip to EWTN Studios (Alabama, Washington, D.C. or Rome). We'd love to meet you.

Choosing the Best Executor for Your Will

Part 1 of 2

by Cimarron "Cim" Gilson, Esq.



When putting your final affairs in order, you may think of getting a will done – or a living trust -- as well as medical and financial powers of attorney. This article focuses on how to choose the best executor for your will and what duties your executor will be responsible for.

First, let's talk terminology. The position of "executor" of a will often goes by several different titles depending on the state you live in – personal representative, estate representative, executor, administrator, independent executor, etc., but these all generally refer to the same position, that of the fiduciary in charge of carrying out, or executing, the terms and provisions of your last will and testament in the probate process. Then what?

The "probate process" is the legal process for executing your will. It usually takes place in a local court of law (often called a probate court) and can involve a full estate administration (what you normally see in television shows and movies) or an abbreviated process, often called "muniment of title," where no executor or estate administration occurs. While some executors may act *pro se*, or without legal counsel, most often, the executor will need to hire a probate attorney to help navigate him or her through the probate process. I recommend that the survivors of a loved one, or the fiduciary named in your will or trust, always consult with a probate attorney shortly after a loved one dies. In this way, he or she will receive sound guidance on the next steps to take, particularly if a legal probate process will be required.

In most cases, legal action will be necessary to carry out your will's terms, but sometimes, no legal action is required, even when a will exists. It may surprise you, as it does many who enter my office, to learn that a will does not, by itself, provide any legal authority to the executor named in it to carry out its terms. It is surprising, because the executor is able to transfer many of the assets you leave behind to the beneficiaries named in your will without ever seeing an attorney or going to court. This reality is more the result of you having set up beneficiary designations for your insurance policies and financial accounts to pass to certain individuals upon your death, rather than a case of the will giving your executor authority to make these transfers. In some states, real estate can also pass automatically to the surviving spouse or to the children. Again, this is not because your will said so, but because certain states allow real property to be deeded to joint owners with rights of survivorship, a sort of automatic transfer to the survivors when one or more joint owners die. All that said, if your assets do not have survivorship rights or beneficiary designations, this is many times a case where your will must be admitted into the probate process by a judge before its terms can be fulfilled.

Editor's Note: In Part II of the Spring 2024 issue, Cim will discuss what happens once a probate attorney recommends the probating of your will.

Cim Gilson, Esq. is an Estate Planning Attorney from San Antonio, Texas.

Catholic Estate and Personal Planning Presentation & Workbook

On August 26, 2023, the EWTN Legacy Giving Team hosted a Catholic Charitable Estate and Personal Planning Presentation in Birmingham, AL, during the weekend of the EWTN Family Celebration. The luncheon presentation provided EWTN Family Members with information pertaining to estate planning, charitable giving strategies, and end-of-life planning issues. Similar to our popular virtual presentations, this luncheon also provided attendees with an added opportunity to meet and ask questions of the Legacy Giving Staff and Estate Planning Attorney Cimarron "Cim" Gilson. The no-cost, no-obligation presentation offered important estate and gift planning information in a relaxed setting over lunch.

In addition to offering the Charitable Estate Planning Presentations, the Legacy Giving Program offers a free Catholic Estate and Personal Planning Workbook. This workbook will assist you as you begin the process of planning for your future. It can be a valuable tool that will help you gather information. It will also help you think about how to use your estate plan to provide for your loved ones and support the causes you care about. Once completed, you will be prepared for an informed and meaningful conversation with your attorney regarding your desires for the future. Your attorney can use the information to draft an estate plan that will fulfill your wishes and create a lasting legacy.

"I am hoping to retire in the next five years and am working with a financial planner. Through EWTN, I discovered the Catholic Estate and Personal Planning Workbook. This impressive tool frames estate planning within a Catholic worldview and complements the information I have obtained from community classes and other sources. There is an abundance of information arranged in a format that is easy to follow. For example, it contains an indispensable worksheet for Survivor's Action Items and Concerns with elements I have not seen addressed elsewhere. EWTN also offers seminars that address estate planning. The Workbook and seminars provide a thoughtful, Catholic perspective and inspire people to take action now. I highly recommend using this workbook to guide your decisions. Prayerfully do this for your family and for your peace of mind." - EWTN viewer and supporter, Lynn Zuercher.

If you're interested in attending out next Catholic Estate and Personal Planning Presentation held virtually on January 16, 2024 at 12 PM EST / 11AM CST and/or receiving a FREE copy of the Catholic Estate and Personal Planning Workbook, contact (205) 271-4522 or legacygiving@ewtn.com

The Charitable Gift Annuity

Shirley Macaron

The charitable gift annuity (CGA) is a gift that supports the evangelization of EWTN and provides you, or you and another person, with lifetime income. To create a CGA, transfer an asset or cash to charity. In turn, the charity agrees to make partially tax-free payments to you for life. At the end of your life, the remaining annuity supports EWTN. The CGA rate is based on your age. Contact us for your personal rate and gift illustration.

"When I saw it, I grabbed it!" Shirley was excited to learn that EWTN offers Charitable Gift Annuities. Shirley has established several CGAs over the years. She likes the tax deduction and good interest rate based on her age. She can make generous gifts to charity with the security from fixed income for life.

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 at (205) 271-4522 or legacygiving@ewtn.com.

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EWTN Global Catholic Network

EWTN Mission Advancement
5817 Old Leeds Rd.
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Meet EWTN's Legacy Giving Staff

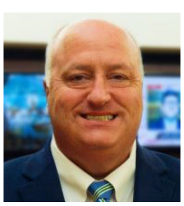
Ryan Flood, Karen Cullinan Silva, Dan Clark, & Khayla Jones

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 23 years of experience.

Karen Cullinan Silva, CFRE, FCEP, Legacy Giving Officer

Karen applies her 15 years of professional fund-raising 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 gift and estate planning ideas.



Daniel F. Clark, J.D., Legacy Giving Officer

The Legacy Giving Program is happy to welcome Dan Clark as its newest team member. Dan has nearly 30 years of experience helping individuals and families with philanthropic and estate planning.

Khayla Jones, Stewardship Coordinator

Khayla serves as the initial point of contact for all inquiries into the EWTN Legacy Program. Additionally, Khayla oversees the EWTN Legacy Society and helps to coordinate both our virtual and in-person Estate & Personal Planning Seminars.

Contact Legacy Giving

(205) 271-4522

legacygiving@ewtn.com