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**EWTN**

Global  
Catholic  
Network

### EWTN FAMILY MEMBERS SHARE THEIR STORIES

## Why and How We Give to EWTN

by Ryan Flood

*"We used our IRA assets to support EWTN's Mission and reduce our taxable income"*




**A few months ago, we sat down with Bob and Madeline Lombaerde to discuss their experience with EWTN.**

Robert first stumbled across EWTN on the radio while driving home from work one evening. When he arrived home, he and his wife Madeline turned their television to EWTN and experienced their first encounter with Mother Angelica. Mother's message that day would have a profound impact on Madeline from the very first moments. "I remember it distinctly, Mother looked right into the camera as if she were speaking directly to me and said, 'Jesus loves you, not like a grain of sand on the beach, but really loves you as a person!' I had been a Catholic my entire life, but for the first time I really believed and understood the Lord's love for me. Since that day, EWTN programming has continued to impact our lives in so many ways; we have learned so

much about our glorious Catholic faith and the power the Faith has in transforming the lives of so many people. We contribute our financial resources to EWTN because we understand the urgent need to get the fullness of the message of the Catholic faith to the people in the world who are suffering from the lack of Truth!

"As Robert is now at the age when he must begin taking mandatory withdrawals from his IRA, we decided to call Ryan Flood, EWTN's Legacy Giving Advisor, to discuss our giving plan with him. Ryan spoke with us about the qualifications for a gift from our IRA and provided us with the Qualified Charitable Distribution Letter of Instruction, which we sent to our IRA plan provider to initiate the transfer. This letter contained all the pertinent information we needed to make a gift directly from Robert's IRA to EWTN. I encourage you, too, to contact Ryan directly to discuss this very efficient giving option with him."

"Thank you, Mother Angelica and EWTN, for the impact you have made in our lives and in the lives you continue to reach by proclaiming the Truth of the Gospel!" 


# Don't Leave Your IRA to the IRS



For EWTN Family Members who would like to name EWTN in their estate plans, a Beneficiary Designation is one of the easiest ways to do so. By simply calling your plan provider and requesting a Beneficiary Designation Form, you can name EWTN as a percentage beneficiary of your IRA or other retirement plan.

The IRA (Individual Retirement Account) is considered an IRD (Asset Income in respect of a decedent) which means that the funds in the IRA are taxable when left to anyone other than a spouse. However, the funds are not taxed when left to a 501 c 3 charitable organization such as EWTN. However, it is very important to make sure you have the proper legal title and tax identification or EIN number for EWTN if you choose to establish the charitable beneficiary designation.

For the past two decades, individual taxpayers have housed a significant amount of their wealth in traditional IRAs. However, one of the challenges for them, at the death of the second spouse, is how to pass this wealth to heirs while

avoiding a significant portion being taxed. One option would be leaving a percentage of their retirement plan directly to charity and a percentage to heirs by way of a beneficiary designation. An option for larger accounts would be to establish a Testamentary Charitable Remainder Trust. Such a Testamentary Charitable Remainder Trust would create an income stream (usually for a term of years, not more than 20) to heirs, with the remainder designated to charity. 

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*To learn more about these two gift options, please contact Ryan Flood, EWTN's Legacy Giving Advisor.*

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## A Beneficiary Designation Gift To Impact Our Work



**Mary had been a longtime supporter of EWTN. She had been thinking about how she could make a significant gift to support the Network's evangelization efforts.**

She met with her attorney to explain her ideas and describe her assets. Originally, she thought about leaving her IRA to her children and other assets to charity.

Her attorney suggested a different strategy. He explained that if her children inherited the IRA, the

estate could pay estate taxes, and her children would pay income taxes on the IRA. But, by naming EWTN as the beneficiary of her IRA and giving her other assets to her children, Mary could still provide a nice inheritance to her children while helping them avoiding the income tax!


Mary contacted, Ryan Flood, Legacy Giving Advisor for EWTN and asked for EWTN's legal title and EIN number then she contacted her IRA plan provider who sent her an IRA beneficiary designation form. She completed the form, named EWTN as the primary beneficiary of her IRA and mailed the form back to the plan provider. Mary was happy to learn about this giving strategy that will benefit the evangelization efforts of EWTN.

# Legacy Giving Advisor: Ryan Flood



Do you have a particular asset you would like to donate to EWTN? Are you or your advisors considering a particular gifting strategy? For almost two decades Ryan Flood, EWTN's Legacy Giving Advisor, has been assisting generous

people like you in finding creative ways to leave a lasting legacy to Catholic causes whose missions are making

a big impact on the Church and the world. Ryan's promise to you is careful listening, attention to your best interest, solutions that reflect your values and priorities, professional expertise and absolute confidentiality. 

## Contact Ryan Flood:

(205) 569-2674

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## The Catholic Estate and Personal Planning Workbook

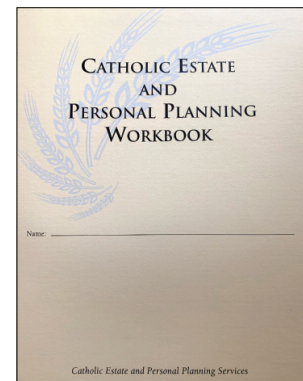
Make this the year you get your estate planning in order

EWTN offers a free Catholic Estate and Personal Planning Workbook.

The Workbook helps you prepare to draft a new plan or update an existing one.

For a free copy of the Workbook, please contact Ryan Flood, FCEP, EWTN Legacy Giving Advisor, at (205) 569-2674.

You may also visit [ewtn.giftlegacy.com](http://ewtn.giftlegacy.com) or [ewtn.com/estateplanningworkbook](http://ewtn.com/estateplanningworkbook).



**New EWTN Legacy Giving Website** - For additional learning opportunities please visit the EWTN Legacy Giving Website: [ewtn.giftlegacy.com](http://ewtn.giftlegacy.com)

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Flood**

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## The IRA Charitable Rollover (Qualified Charitable Distribution) Keeps Rolling – Even After Tax-Reform

Did you know that the IRA Charitable Transfer benefits donors age 70 ½ and up?

The IRA Charitable Transfer (Qualified Charitable Distribution) is an excellent way to make gifts and receive tax benefits in return. As you plan your required minimum distribution for 2019, consider using your IRA account to

make the most of your charitable giving. You will receive a tax benefit even if you take the standard deduction! It's important to consider your tax situation before deciding whether to make a charitable contribution from your IRA. Be sure to share this gift plan with your advisors. 

**Contact EWTN's Legacy Giving Advisor:**

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