



# LEGACY GIVING NEWSLETTER

A QUARTERLY EDUCATIONAL PUBLICATION OF EWTN

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WINTER 2026

## UPCOMING EVENTS



### VIRTUAL CATHOLIC ESTATE PLANNING PRESENTATION

**Tuesday, March 10, 2026**  
**1:00 PM EST/ 12:00 PM  
CST**

*Join EWTN's Legacy Giving team  
for a free online seminar on  
estate planning strategies.*



**SCAN NOW**  
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Presentations**

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

**EWTN**

Global  
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**Find us online:**  
www.ewtnlegacy.org

**Mailing Address:**  
5817 Old Leeds Road  
Irondale, AL 35210

## EWTN FAMILY MEMBERS SHARE THEIR STORIES

# John's Plan

by Ryan Flood



John Lord

### Does your estate plan reflect your wishes and your values?

John Lord carefully planned his estate so that his family would be provided for and that the charitable organizations he valued would benefit from his lifelong success. John's foresight and commitment to planning led him to create a Revocable Living Trust that included provisions for his family and charitable organizations, including EWTN.

Sadly, more than half of Americans die without an estate plan. Regardless of the size of your assets, you can act today in order to thoughtfully steward what God has entrusted to you.

### John's Life

John led a remarkable life, guided by his Catholic faith. EWTN programming and content were a source of inspiration and comfort for him. John's son (his trustee) shared with me some of his story.

John Baldwin Lord grew up in a Chicago suburb and served courageously in World War II. His B-24 bomber was shot down behind enemy lines, leaving him severely burned and imprisoned in a POW camp until he was rescued in April 1945. After the war, John married, raised six children, and built a successful career as a chemical engineer. His wife Marian passed away in 1989 after 40 years of marriage. John later remarried and moved to a retirement community in South Carolina. In his later years, his devotion to the Blessed Virgin Mary deepened. As his health declined, EWTN programming became his source of solace and spiritual strength.

### The Result

John's generous legacy gift enables EWTN to share the Catholic faith worldwide. His thoughtful planning ensures his values live on. May John's soul, and all the souls of the faithful departed, rest in peace.

*If you'd like to learn more about the benefits of charitable estate planning, please contact the EWTN Legacy Giving Office at 205-271-4522 or email us at legacygiving@ewtn.com. We would be glad to help you explore options tailored to your goals.*

# 2026 Tax Law Changes Impacting Charitable Giving

by Daniel F. Clark, J.D.



Beginning in 2026, new provisions in federal tax law change how some charitable gifts are treated for income tax purposes. These updates create new opportunities for some donors while presenting some new gift planning considerations for others. Here is a summary of the most significant changes and what they may mean for your charitable giving:

## New Deduction Opportunity for Non-Itemizers

Starting in 2026, donors who take the standard deduction on their tax return will now be able to take a limited income tax deduction for charitable gifts (up to \$1,000 for individual filers; up to \$2,000 for married couples filing jointly). This “above-the-line”

deduction reduces taxable income even if you take the standard deduction.

## New Provision for Donors Who Itemize


Donors who do NOT take the standard deduction and itemize deductions on Schedule A should be aware of two important

changes. There is now a 0.5% AGI floor, meaning that only charitable gifts that exceed 0.5% of your AGI (adjusted gross income) will be eligible for an income tax deduction. For example, if your AGI is \$100,000, the first \$500 in charitable contributions would not be deductible. Also, for taxpayers in the highest income tax bracket, the deductibility of charitable gifts will be capped at 35%.

## New Limits for QCDs

Beginning in 2026, the annual limit for Qualified Charitable Distributions (QCDs) from an IRA will increase to \$111,000. Donors age 70½ or older may direct up to this amount from a traditional IRA directly to qualified

charities like EWTN, excluding the gift from taxable income. For those age 73 or older, the QCD also satisfies the required minimum distributions (RMDs). This can be an especially attractive way to give, especially for non-itemizers.

Also, the limit to fund a one-time Charitable Gift Annuity (CGA) with a QCD in 2026 is now \$55,000. Any amount you use to fund your CGA counts toward the overall \$111,000 QCD limit and allows the donor to receive a fixed lifetime income while dispersing the taxable income over the donor's life expectancy. 

## Contact EWTN Legacy Giving Program for More

*Before making any decisions, we encourage you to consult with your financial, tax, or estate planning advisor. If you'd like to learn more about the recent tax law changes or planned giving in general, please contact the EWTN Legacy Giving Office at 205-271-4522 or email us at [legacygiving@ewtn.com](mailto:legacygiving@ewtn.com). We would be glad to help you explore options tailored to your goals.*

## Highlights: Beginning in 2026, federal tax law introduces new rules for charitable giving:

- **Above-the-Line Deduction** for Non-Itemizers: Standard deduction filers may now deduct up to \$1,000 (individual) or \$2,000 (married filing jointly) for charitable gifts.
- **Changes for Itemizers:** Gifts must exceed 0.5% of AGI to qualify for deduction. Deductibility for top-bracket taxpayers is capped at 35%.
- **Qualified Charitable Distributions (QCDs):** Annual QCD limit from IRAs increases to \$111,000. One-time Charitable Gift Annuity funding limit rises to \$55,000.

*Consult your financial advisor before making decisions. For details, contact EWTN Legacy Giving Office at (205) 271-4522 or [legacygiving@ewtn.com](mailto:legacygiving@ewtn.com).*

# Lifetime Income Agreements




Did you know that you could support EWTN while also ensuring a steady stream of retirement income, thanks to lifetime income agreements like charitable gift annuities?

## Benefits of Lifetime Income Agreements

- Support EWTN while securing income payments for life or a designated number of years.
- Give assets that you no longer need or care to manage (such as rental property or vacation homes) to benefit EWTN's programming and receive income for life.
- Receive an immediate income tax deduction at the time of your gift, and reduce capital gains tax when funding your gift with appreciated assets.

## We Can Help You...

- Determine the assets that are most cost-effective for you to give.
- Create detailed gift illustrations of potential tax deductions and income stream for you and your advisors.
- Ensure your plans reflect your family needs and charitable giving goals.

To receive your life income agreement illustration, schedule a consultation with one of EWTN's Legacy Giving officers by contacting [legacygiving@ewtn.com](mailto:legacygiving@ewtn.com) or 205-271-4522. You may also visit [ewtnlegacy.org](http://ewtnlegacy.org). 



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## TAKE THE NEXT STEP TODAY!

**Your legacy can make a lasting impact.  
Partner with EWTN to share the  
Catholic faith worldwide.**

***Call us today at (205) 271-4522 or email  
[legacygiving@ewtn.com](mailto:legacygiving@ewtn.com) to learn more about  
charitable estate planning and upcoming seminars.***



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### EWTN Mission Advancement

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## Meet EWTN's Legacy Giving Staff

**Ryan Flood, Karen Cullinan, Daniel Clark,  
Charlie Van Patten, Jared Stroik, Khayla  
Jones, and Christina Dudenhefer**



**Ryan T. Flood,**  
**CAP®, FCEP**

*Director, Legacy  
Giving Program*



**Karen Cullinan,**  
**CFRE, FCEP**

*Legacy Giving  
Officer,  
Mid-South and  
Southwest regions*



**Daniel Clark,**  
**J.D.**

*Legacy Giving  
Officer, Mid-Atlantic  
and Northeast  
regions*



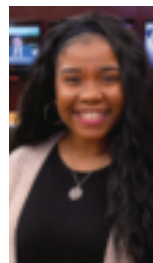
**Charlie Van  
Patten, J.D.,  
CAP®**

*Legacy Giving  
Officer,  
Southeast  
region*



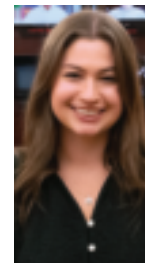
**Jared Stroik,  
J.D.**

*Legacy Giving  
Officer,  
Midwest &  
Upper Midwest  
regions*



**Khayla  
Jones**

*Legacy  
Stewardship  
Coordinator*



**Christina  
Dudenhefer**

*Legacy  
Giving  
Assistant*

Contact  
Legacy Giving



(205) 271-4522



legacygiving@ewtn.com