

FAQ's - Becoming a Member of the Espiritu Santo Legacy Society

Thank you for your interest in learning more about the Espiritu Santo Legacy Society, whose mission is to strengthen the Espiritu Santo Catholic parish to ensure the continuity of our ministries, groups and organizations through the legacy gifts of our parishioners.

These frequently asked questions may help guide your consideration.

How do I become a member of the Espiritu Santo Legacy Society?

To become a member of the Legacy Society you must notify the parish that you have provided for Espiritu Santo church and/or school through a planned gift that may include any one of the following:

- A bequest in a last will and testament, living trust, or other estate trust
- A charitable gift annuity
- A deferred payment gift annuity
- A gift through a donor-advised fund
- A charitable remainder trust or charitable lead trust
- Naming the Espiritu Santo as a beneficiary of an Individual Retirement Account, 401(k) plan, pension, or other qualified retirement plan
- Naming Espiritu Santo as the owner and final beneficiary of a life insurance policy

What are the benefits of becoming a member of the Legacy Society?

The most important benefit you receive is the satisfaction derived from making a lasting contribution to help the Church prosper in living out the Gospel of Jesus Christ. Other benefits of giving include:

- The opportunity to memorialize family and loved ones
- Participate in building community through your gift to Espiritu Santo
- Receive important tax benefits through annual and planned gifts
- Fulfill the requirements of stewardship to the Church

Your membership involves no dues, obligations or solicitations, but it does allow us to thank you and recognize you for the plans you have made.

I don't have a will, where do I begin?

Through our Lifetime Planning programs, we are introducing parishioners to how to begin the process of preparing a will, and offering other useful information on planning for financial milestones and options for planned giving. Program dates and details are posted under Legacy Society events and activities on the website and published in the weekly bulletin.

What if I want to keep my Gift private?

Details of one's gift will be kept confidential, and members are welcome to decline public recognition. However, we encourage public recognition so you may inspire generosity in others.

How can I learn more?

The Legacy Society is an informational resource. Through education and appropriate professional referrals, staff and lay leaders can help parishioners in developing their plans and understanding planned giving options.

Through our Lifetime Planning programs, conducted by professionals in the financial, legal and accounting fields, our parishioners and their families can learn more about estate planning, elder law, charitable giving, medical directives and living wills.

To learn more about the Legacy Society, contact Tim Bergevin, Stewardship and Family Life Ministries, 727-726-8477.

Every gift is important and shows you share our vision and faith in the future of Espiritu Santo church.

Let us not grow tired of doing good, for in due time we shall reap our harvest, if we do not give up. So then, while we have the opportunity, let us do good to all, but especially to those who belong to the family of the faith. GALATIANS 6:9-10