



## The Catholic Diocese of Charleston – Bequest Language

You recognize the good work the many ministries of the Diocese do throughout South Carolina and you have been supporting us for many years. ***Have you considered a gift to us in your will?*** A bequest to benefit the Diocese, your parish, or any of the many diocesan ministries in your will is simple to do and costs nothing during your lifetime. When your estate is settled after your passing, your gift will be made to the Diocese or the Catholic Community Foundation of South Carolina for the benefit of the Diocese, Parish, School or Diocesan Ministry of your choice. If your estate is taxable, the gift will be eligible for a charitable deduction for the value of your bequest. Your gift will allow us to continue God's work here in South Carolina for decades and generations to come.

### Percentage Bequest

You can make a gift of what remains in your estate after all expenses have been paid and specific bequests to family (and other charities) have been fulfilled. Ask your attorney to use this paragraph:

*I hereby give, devise and bequeath to Bishop of Charleston, a Corporation Sole, DBA the Catholic Diocese of Charleston, 901 Orange Grove Road, Charleston, SC 29407, (insert percentage) % of the rest, residue and remainder of my estate to be used for the following purposes (Insert one or more of the following, and if more than one, specify the percentage of this residuary bequest for each):*

- *For its most urgent priorities, as determined by the Bishop of the Diocese of Charleston*
- *For the benefit of (name of: parish and its city; school and its city; or ministry)*
- *For the (list name of an existing endowment fund, or contact the Diocese's Office of Stewardship and Mission Advancement if you would like information on creating an endowment fund within the Foundation.)*

#### OR

*I hereby give, devise and bequeath to the Catholic Community Foundation of South Carolina, 901 Orange Grove Road, Charleston, SC 29407, (insert percentage) % of the rest, residue and remainder of my estate for the following purposes (Insert one or more of the following, and if more than one, specify the percentage of this residuary bequest for each):*

- *For the most urgent priorities of the Catholic Diocese of Charleston, as determined by the Bishop of the Diocese of Charleston;*
- *For the benefit of (name of: parish and city; school and city; or ministry)*

*For the (list name of an existing endowment fund, or contact the Diocese's Office of Stewardship and Mission Advancement if you would like information on creating an endowment fund within the Foundation.)*

**NOTE:** If your gift is being made through a trust instead of a will, the above language will need to be amended by your attorney as needed, to refer to a trust distribution by the Trustee of your trust.

## Specific Amount Bequest

To leave a specific amount of your estate to your parish or Diocese in your will, ask your attorney to use the following language:

*I hereby give, devise and bequeath to Bishop of Charleston, a Corporation Sole, DBA the Catholic Diocese of Charleston, 901 Orange Grove Road, Charleston, SC 29407, the sum of \$\_\_\_\_\_ to be used for the following purposes (Insert one or more of the following, and if more than one, specify the percentage of this bequest for each):*

- *For its most urgent priorities, as determined by the Bishop of the Diocese of Charleston*
  - *For the benefit of (name of : parish and its city; school and its city; or ministry)*
- *For the (list name of endowment fund, or contact the Diocese's Office of Stewardship and Mission Advancement if you would like information on creating an endowment fund within the Foundation.)*

### OR

*I hereby give, devise and bequeath to the Catholic Community Foundation of South Carolina, 901 Orange Grove Road, Charleston, SC 29407, the sum of \$\_\_\_\_\_ to be used for the following purposes (Insert one or more of the following, and if more than one, specify the percentage of this residuary bequest for each):*

- *For the most urgent priorities of the Catholic Diocese of Charleston, as determined by the Bishop of the Diocese of Charleston;*
  - *For the benefit of (name of : parish and city; school and city; or ministry)*
- *For the (list name of endowment fund, or contact the Diocese's Office of Stewardship and Mission Advancement if you would like information on creating an endowment fund within the Foundation.)*

**NOTE:** If your gift is being made through a trust instead of a will, the above language will need to be amended by your attorney as needed, to refer to a trust distribution by the Trustee of your trust.

If you are planning to name the Diocese or parish as one of your beneficiaries, please let us know, so we can work with you and your advisors to make sure your gift is planned and administered properly for the purposes you desire. **Gifts of real estate and gifts made for restricted purposes require the advance approval of the Bishop.** It also gives us the opportunity to thank you for your support. You can remain anonymous if you prefer.

### **For more information, please contact:**

**The Office of Stewardship and Mission Advancement  
Diocese of Charleston  
901 Orange Grove Road  
Charleston, SC 29407  
(843) 261-0435  
cmummert@charlestdiocese.org**