

The Bartholomew Society

Securing and Strengthening Financial Resources for Our Parish's Next 50 Years

Having recently celebrated our parish's 50th anniversary, it would be easy to "rest on our laurels" when seeing how far the Spirit has brought our parish in such a short span of time. But in celebrating our past, we must also work to secure and strengthen that legacy for our parish's future.

What Is Our Legacy?

What do we want to "secure and strengthen"? Our Catholic faith being lived out in word and deed in the lives of our parishioners. We see it operating throughout our parish in a multitude of ways, when:

- We come together to celebrate the sacraments, particularly the Mass.
- We champion new life through Respect Life and baptism.
- We educate our parish children through the school, Sunday classes, Children's Liturgy of the Word, and youth programs.
- We comfort the suffering and lonely through St. Vincent de Paul Society, bereavement support and planning, and visits to the homebound.
- We deepen our spiritual lives through parish retreats and programs like Coffee Talk and Mothers in Prayer.

In fact, our parish has over 70 active ministry areas through and in which our parishioners are contributing their time, talent, and treasure to the glory of God. That is a rich legacy with the potential to significantly impact our families, parish, and the larger community.

It comes as no surprise that 70+ ministries require funding. Or that the materials for running catechetical programs need to be renewed and revised. Or that a 17-acre campus requires maintenance. But what may surprise some people is how quickly these "little things" add up... And how important it is to have the financial resources to keep our ministries and parish thriving.

Consider Planned Gifting

We invite you, as an individual or family who has shown a strong commitment to our parish and faith through your involvement and/or financial support, to join *The Bartholomew Society*.

The Bartholomew Society is a group of parishioners who have made arrangements for planned gifting to bolster the financial resources of our parish. There are a variety of ways in which planned gifting can be done to wisely steward your resources and reflect your interests; the next two pages explain some of the options. Please review it, talk with your family and advisors, and prayerfully consider whether or not you are called to give in this manner.

... for where your treasure is, there your heart will be also.

- Matthew 6:21



1. Choose Your Method(s) for Making a Planned Gift to St. Bartholomew...

If you pursue planned gifting to the parish, be sure to include your key advisors in your decision-making. Almost all of the planned gifting options will require the services of your attorney, broker, financial institution, or financial planner in addition to the Parish Business Manager. We want your decision to not only benefit the parish, but to work with your larger goals and plan for your estate.

Method	How It Works
Your Will	After you have provided for your family through your will, bequeath a gift to the parish. You can set a specific dollar amount, a percentage of your total estate, or a percentage of your residuary estate.
A Gift of Stock	By giving St. Bartholomew Parish highly-appreciated stock with a low cost basis, you not only give to the parish but avoid capital gains tax and receive a tax deduction for the appreciated value.
Archdiocesan Annuity	The Archdiocese of Cincinnati has established a charitable gift annuity program to benefit Archdiocesan entities. In exchange for your gift benefiting the parish, the Archdiocese promises to pay you a fixed amount for life. This charitable gift annuity can provide a fixed income and an immediate tax deduction for you while simultaneously benefiting the parish.
Charitable Remainder Trust	By funding a Charitable Remainder Trust with your highly-appreciated low-cost stock, you will enjoy income payments the rest of your life, avoid capital gains tax, and earn an immediate tax deduction. When the trust ends, any remaining funds will go to the parish.
Memorial/ Living Memorial	Donations can be made "in honor of" or "in memory of" a loved one.
Retirement Benefits	Name the Parish as the contingent or final beneficiary of your retirement benefits. If you outlive all of your heirs, the benefits will come to St. Bartholomew.
Life Insurance	Purchase a life insurance policy or convert an existing policy, making the Parish owner and beneficiary. This offers you immediate tax benefits.
Real Estate	Contribute your real estate now, but retain the use of it for the rest of your life. Enjoy an immediate tax deduction. The Parish will receive the real estate when you no longer need it.
Savings Account in Trust	Establish a savings account in trust for the Parish. You retain complete control and use of the account during your lifetime, then the balance goes to the Parish as a legacy.
Pooled Income Fund/ Charitable Remainder Mutual Fund	A pooled income fund is a trust that is established and maintained by the parish. During one's lifetime, any pro-rated investment income will be returned to you annually. Earnings after that point will belong to the parish. Contributions to pooled income funds qualify for charitable income, gift, and estate tax deduction purposes. You can also avoid recognition of capital gain on the transfer of appreciated property to the fund.

2. Choose the Ministry Area(s) You Want Your Gift to Support...

Fund Name	Purpose
Education Endowment	<p><u>Provide tuition assistance</u> to parish families who otherwise struggle to make payments for their child(ren)'s education at John Paul II Catholic School. Alternatively, a scholarship can be established to recognize academic, leadership, or character excellence. Principle from the fund is untouched so as to maximize the gift and the number of families blessed by it.</p> <p>Parishioners who experienced – or whose children experienced - the beauty of Catholic education find this fund a wonderful way to “pay forward” what they have received. It is also a way for childless parishioners to take part in raising our next generation of Catholics.</p>
Building Maintenance	<p><u>Support the maintenance of and improvements to our capital resources</u> – the church, school, parish activity center, and other parish buildings/grounds.</p> <p>A number of our current parishioners were members of some of the parish's founding families and may enjoy this opportunity to join with their parents and grandparents in solidifying our physical plant.</p>
Liturgical Fund	<p><u>Celebrate the sacraments</u> by providing the materials used for our regular and special liturgies. This includes bread and wine, oils, candles, ashes, linens, vestments, music, programs, and more. Also, materials are needed to celebrate Mass of Anointing, Silver and Golden Wedding Anniversary recognitions, Bereavement Ministry efforts, Ministry Nights, and Welcome Sundays.</p> <p>This fund can be a wonderful way to honor or remember loved ones who have/had a special devotion to the liturgy.</p>
Pastoral Ministry	<p><u>“Do unto others...”</u> Our parish's extensive list of pastoral efforts includes everything from RCIA to Hunger Sunday to hosting funeral receptions to youth mission trips and athletic activities. Through these ministries, the laity put their faith into action and the parish becomes a place of vibrant activity and meaningful fellowship.</p> <p>Your gift supports training for lay persons and the various expenses of our Formation and Pastoral Care ministries</p>
Unrestricted	<p><u>“Yes” to all of the above.</u> Your unrestricted gift will be used at the pastor's discretion to support the most immediate program or need of the parish, whether it relates to education, our physical plant, our liturgical celebrations, or our pastoral ministries.</p>

3. Let Us Help...

Really, there's no need to wait until "Step 3" to talk with us! If you're considering making a planned gift but aren't sure yet or want to better understand the options before bringing in your professional advisors, feel free to chat with us. This is a no-pressure situation – not everyone is called to or is able to support the parish and the Church in this manner. We simply invite you to consider it.

If you *have* decided that you're ready to pursue planned gifting, then be sure to let us know. We are happy to partner with your legal or financial counsel to ensure that the process goes smoothly for you, meets your philanthropic goals, and is personally satisfying.

Contact the parish Business Manager, Skip Borgman, to learn more or to start the process. You can reach Skip at Skip.Borgman@fuse.net, or 522.3680, or leave a voicemail at 728.3146, x151.

Thank You for Considering Planned Gifting!

Conscious financial gifting will strengthen and secure our parish, our faith, and our Church for the next 50 years, and beyond. Our parish sincerely appreciates your engagement with the community, and your consideration of planned gifting.

The Benefits of Membership

We know that people who are generous enough to make a planned gift generally aren't looking for applause and recognition – they just do it because they can.

But as the community benefiting from that generosity, we, like the leper who returned to Christ, want to be sure we say, "thank you." To do that, members of *The Bartholomew Society* receive a certificate of appreciation, inclusion on our society plaque in the church, and an invitation to our annual event. Other means of recognition are also available based on the nature and purpose of the planned gift.

If nothing else, it's important to recognize our planned gifters so that their example can inspire others in our parish community to follow their lead. But if you wish to remain anonymous, we can certainly understand and will honor that request so long as you know that your generosity is tremendously appreciated.



We love, because He first loved us.

-1 John 4:19