

Basics about Bequests

When planning an estate, think about the institutions that have played a role in your life. This might be your parish, parish school, diocesan high school, or other ministry of the diocese.



You helped them during your life with time, guidance, and financial assistance. You endorse their mission and believe that they will continue to make a difference for good in the world far into the future.

To make a bequest, see *the sample text below in segment on "Gift Designations."* Bequests are not payable until death, so it does not affect your assets or cash flow during your life. Charitable bequests are private. Your will is not filed or made public until your death.

Trusts are never made public unless you instruct otherwise. A will or trust is revocable; you can change the provisions of your will or trust at any time until death. Since your parish, parish school, or other ministry will likely not receive your bequest until far into the future, its terms should be as general as possible.