



By Leaving a Legacy at Epiphany, you become
the “Heart and Hands of Christ”
*ensuring that future generations will continue to have their spiritual, educational
and social needs met through the ministries of Epiphany Cathedral Parish and School.*

LEAVING A LEGACY IN YOUR WILL OR TRUST

The last Will and testament is a widely popular legal instrument used by many in our society. Though most people are aware they need a Will, as many as 64% of Americans don't have one. A Will is a unique legal document that must meet specific state requirements to be valid, a “living document” until you die – meaning it can be changed, amended, or updated at any time. However, when death occurs, the last Will and testament is final and becomes the controlling document (with a few exceptions) that instructs how and to whom assets are distributed.

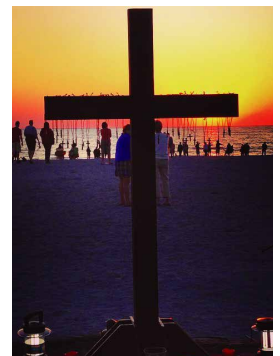
Peace of Mind

There is much to be said for the peace of mind that accompanies a well thought out Will. You are assured that your assets will be distributed on your terms in a thoughtful way. You can provide for the specific needs of loved ones. Through a Will, critical decisions are made by you – not the state, the court, or person you may hardly know.



Clarity of Intent

Your Will is a legally enforceable document used by the court to control the disposition of your assets. It is an ideal way to make certain your wishes are known and ultimately fulfilled.



Service to Others

Your Will can also be viewed as a gift to family, friends and/or charities. Because your decisions are documented, you relieve loved ones of the difficult job of trying to decide how you would have wanted assets to be distributed. That alone is a gift to them.



LEGACY SOCIETY

If you have a Will and/or a trust currently, or have plans to create one, we hope you might consider including a gift to Epiphany Cathedral Parish and/or School. **You can be the “Heart and Hands of Christ”** by leaving a legacy gift, ensuring that future generations will benefit from the many ministries of Epiphany Cathedral Parish and School.

If you have already named Epiphany Cathedral Parish and/or School as a beneficiary in your Will or trust – we sincerely THANK YOU! If you have not already, please consider letting us know your intentions.

If you have questions, or would like to speak with someone about remembering Epiphany Cathedral Parish and/or School in your Will, please let us know.

The wording of a bequest in your Will can be as simple as the following:

Parish Bequest: *“I bequeath (the sum of \$_____) or (___% of the residue of my estate) to Epiphany Cathedral, located at 310 Sarasota Street, Venice, Florida, 34285, Parish Tax ID #59-0905506.”*

School Bequest: *“I bequeath (the sum of \$_____) or (___% of the residue of my estate) to Epiphany Cathedral School, located at 316 Sarasota Street, Venice, Florida, 34285, School Tax ID #59-1346327.”*

Please let us know if we can help!
Epiphany Cathedral Office of Development
310 Sarasota Street, Venice, FL 34285
(941) 484-3505 or Legacy@EpiphanyCathedral.org

Type of Gift	Description
Bequests	Name Epiphany Cathedral Parish and/or School in your Will to receive cash, securities, or other property at the time of death. Consider funding a scholarship in perpetuity.
Trusts	Various trust forms are available to prospective donors, and each form has its own characteristics and advantages in the donor’s particular circumstances. Your attorney and/or financial planner can help you choose that which is most beneficial for you.
Insurance Policy	Epiphany Cathedral Parish and/or School named as beneficiary and/or owner of a new or existing policy offers a very special way to leave a legacy because the size of the gift is usually many times the actual amount of the premiums paid up to the date of death.
Charitable Gift Annuity	Cash or securities donated to Epiphany Cathedral Parish and/or School with guaranteed income payments made to you for life. This provides you with fixed payments for life and an immediate income tax donation. Annuity payments receive favorable tax treatments.
Financial Accounts	You can transfer almost any financial account – savings, checking, CD, brokerage or credit union accounts to Epiphany Cathedral Parish and/or School without changing your Will. This is done by naming a “Payable On Death (POD)” beneficiary.

Endowed Gifts

The Epiphany Foundation, Inc. was established in 1990 and is now invested in a separate fund within The Catholic Community Foundation of Southwest Florida. In 2016 over \$330,000 was given to the school and parish.

Donors interested in endowing their gift in perpetuity may invest it with the Catholic Community Foundation of Southwest Florida, Inc. to benefit Epiphany Cathedral Parish and/or School. Planned Gifts and Bequests to the Catholic

Community Foundation of Southwest Florida, Inc. can be discussed in confidence with the Managing Director of the Catholic Community Foundation of Southwest Florida, Inc.