



CATHEDRAL HOME

## PLANNED GIVING GUIDE

# Power in planning

## Resources for lifetimes.

Your gifts can help kids and families for *generations*.

Cathedral Home exists to give kids and families the resources they need to thrive, when they need it most, by providing mental health resources and skills for a lifetime. If you have a legacy gift to share, we can help you give thoughtfully for lasting, generational impact. Planning your legacy for future generations takes careful evaluation. Contact us if you'd like to brainstorm ideas and discuss your charitable interests and goals.

### Why leave a Legacy Gift?

- 1 It leaves your footprint. Giving a gift beyond your lifetime can offer a chance to be remembered and celebrated for generosity. Endowment gifts can be named and honored by children and grandchildren.
- 2 You earn significant tax advantages. Preparing now allows you to plan smarter and have a bigger impact at less cost. Planned gifts can provide tax benefits – sometimes substantial.
- 3 It provides lasting change for an entire families, lifetimes, and <sup>\*\*\*</sup>generations. A legacy gift makes it possible to create a true impact for generations by contributing to ongoing programs, critical facilities, and predicted financial stability for ongoing strategic planning and programming.

A gift with Cathedral Home empowers families to gain the tools to help their kids thrive.

*For a lifetime.*

## Align your values.

These questions can help guide you through your conscious planning and long-term alignment with Cathedral Home or other charitable interests, to build a lasting gift that reflects your values:

- What element of your community means the most to you?
- What societal or cultural improvements inspire you?
- What would you do to support kids and families, or other interests?
- What change do you want to see because of your giving?
- What message or action do you hope to be remembered by?
- Do you want to be remembered with something physical and visible?
- How can you be certain that your gift will be used as you hope?



# QUESTIONS

to discuss with your *Financial & Tax Advisor* to assess ability, tax benefits, and channels:

- What types of gifts are you capable of giving now or with your long-term final wishes?
- Do you want to make a gift during your lifetime, or for many years after?
- Do you have charitable channels already in place?
- Would you prefer to give anonymously or receive recognition? What kind of recognition?
- What are your abilities and wishes for Gifts in trust? Gifts in will? Gifts in real estate? Gifts in stocks?
- What are the tax advantages for each?
- What happens when a legacy gift is in place? Can accounts have successor advisors?
- Who manages the assets in the accounts, and at what minimum amount?
- What are the fees, minimums for opening accounts and making grants, and what would you like for the timeframe for processing grant requests?
- Who will be your point of contact once a grant/trust account is opened?

*To direct a gift*

Legal name: Cathedral Home  
Legal address: 4989 N. 3rd St., Laramie, WY 82072  
Federal tax ID number: 83-0169092  
Phone: 307.745.8997

## Tools for Planning:

Resources are available to help you consider gift details:

Create Your Will For Free: [www.freewill.com/will/basics/personal/get-started](http://www.freewill.com/will/basics/personal/get-started)

Plan Your Beneficiaries: [www.freewill.com/beneficiaries](http://www.freewill.com/beneficiaries)

Sample Bequest Language: *For an unrestricted gift that allows Cathedral Home to determine how to use the funds based on the most pressing needs, use the following language for your will and/or trust:*

"I give to Cathedral Home, a nonprofit corporation currently located at 4989 N. 3rd St., Laramie, WY 82072, or its successor thereto, \_\_\_\_\_ [written amount or percentage of the estate or description of property] for its unrestricted charitable use and purpose."

*To designate your provision for a particular purpose:*

"I give to Cathedral Home, a nonprofit corporation currently located at 4989 N. 3rd St., Laramie, WY 82072, or its successor thereto, \_\_\_\_\_ [written amount or percentage of the estate or description of property]. This gift should be used for (state purpose) if and so long as Cathedral Home determines that the need exists. If Cathedral Home shall determine at the outset or at a later time that the need does not exist, or no longer exists or for some reason it is not possible (or prudent) to administer my gift as originally intended, then Cathedral Home may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above."

If you have named Cathedral Home in your will or trust, please let us know so we can ensure that your gift is used according to your wishes. If you prefer to remain anonymous, we will keep your name and gift in strict confidence. Our Donor Privacy Policy is available upon request.



*Thank you* for considering a gift for youth and families.

scan to contact

Cathedral Home Development Team  
to discuss planned giving ideas  
or email [Development@CathedralHome.org](mailto:Development@CathedralHome.org)



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