

## Legacy/Estate Gifts

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Leaving a legacy that makes a difference is a goal for most of us. By making plans now to include *NCR* in your estate plans you can make a significant impact and help ensure the future of independent Catholic journalism.

If you have designated *NCR* as a beneficiary in your estate, we would love to know. This allows us to thank you prior to receiving your gift, and you become a valued member of our John XXIII Legacy Society.

Consider one of the following ways to give:

### Gifts of Cash

A simple, easy way to make a donation to *NCR*. These gifts provide an immediate benefit to *NCR*. Gifts are tax deductible in the giving year, or depending upon your situation a portion may be carried over into additional years.

### Bequests in Your Will

A frequently used method for deferring a planned gift. You simply designate a dollar amount, specific assets or a percentage of your estate to be given to *NCR* upon your death.

### Appreciated Securities

A popular alternative to gifts of cash. Securities transferred to *NCR* are then sold, and the proceeds go directly to benefit *NCR*. Additional information is available on our [appreciated securities page](#) [2].

### Retirement Plan Assets

Possibly the most advantageous gift type in reducing potential tax implications. At distribution, previously deferred income taxes are payable. Estate taxes may also be due upon death. These income and estate taxes would significantly reduce the amount paid to your heirs. With careful planning, a gift to *NCR* may be most beneficial for your estate.

### Annuity

In exchange for a gift of cash, stock or securities, *NCR* pays you or your annuitants a fixed, guaranteed income for life. You receive the income tax deduction at the time of the gift. The gift remainder goes to *NCR* upon your

death.

## Life Insurance

Designate *NCR* the primary or contingent beneficiary, or the sole owner of your life insurance policy. Following your death, the benefits pass to *NCR* free of federal estate tax.

## Living Trust

Often used in conjunction with a will. A living trust, as the name implies, is established while you're living. It provides directions for asset management while you are living, if you become mentally incapacitated and upon death. At that time, assets avoid probate and are transferred immediately to the designated trustee per your instructions.

When considering an estate gift to *NCR*, we strongly recommend that you seek the counsel of an appropriate, trusted advisor to help you evaluate your specific situation, and consult an attorney if your plans require revisions of a current will or other legal document.

Please contact our Development Office at 1-800-444-8910, ext. 2265 for further information.

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### Links:

[1] <https://www.addthis.com/bookmark.php?v=250>

[2] <https://www.ncronline.org/donate/securities>