



**LEAVE A
LEGACY OF LOVE**
with the Congregation of St. Joseph

PLAN TODAY, BLESS TOMORROW

The work, mission and ministries of the Congregation of St. Joseph are alive and well, and with the help of supporters like you, will continue far into the future. By becoming a legacy donor, you can continue partnering with us in our mission of unifying love and service even after your lifetime. A legacy gift can also reduce your estate's tax burden.

You do not have to be wealthy to make a legacy gift – only willing to include the Congregation of the Sisters of St. Joseph in your estate plans. No matter the amount, your legacy gift will be a blessing!



“We knew and admired Sister Immaculate, both for her work and wonderful humanity. Although this was many years ago, she was a truly good person who treated all nicely and equally.”

-Larry and Joy † O'Rourke, Legacy Donors
in memory of Sister Immaculate Spires, SSJ

How Will My Legacy Gift Be Used?

We welcome unrestricted gifts that can be used where they are most needed, including for mission, ministry or retirement. We also accept gifts restricted for Retirement or Environmental Initiatives.



“The Sisters of St. Joseph do unbelievable good work around the world, and we desperately need more people like that in this world of ours.”

- William M. Lawler, Legacy Donor

WAYS TO BUILD YOUR LEGACY



Include a Gift in Your Will or Trust

One of the simplest ways to make a legacy gift is to name the Congregation of St. Joseph as a beneficiary of your will or trust. This can include gifts of appreciated assets such as real estate, some types of personal property and marketable securities. Our Sample Wills & Trust Language is available upon request.

Designate CSJ as a Beneficiary

You can name the Congregation of the Sisters of St. Joseph as a beneficiary of a tax-deferred retirement plan such as an IRA, 401(k), or 403(b); a life insurance policy, or a commercial annuity. To learn more, or to request a change-of-beneficiary form, please contact your policy administrator.



Invest in a Charitable Gift Annuity

A Charitable Gift Annuity (CGA) involves making a gift of \$10,000 or more today in exchange for fixed income payments for life (for you and/or another person) - often at above market rates, and a future gift to Congregation of St. Joseph. You can fund a CGA with cash, stocks or a qualified charitable distribution (QCD) from your IRA. CSJ partners with the National Catholic Community Foundation to administer its gift annuities. Please contact us for current rates and illustrations of income and taxes.



“Charitable Gift Annuities are a win-win! I get to make a nice gift to my beloved Sisters of the Congregation of St. Joseph, and I get life income and tax advantages.”

- Anonymous, Legacy Donor

We recommend that you consult with your advisor(s) to help you choose the legacy gift that is best for you and your loved ones. Please be sure that your plans include:

Legal Name: Congregation of the Sisters of St. Joseph

Federal Tax ID (EIN): 83-0481134

“ Even though my contribution is small, I'm happy to be able to participate in this way with the sisters as they care for the *dear neighbor*. ”

– Jim † & Vi Powers, Legacy Donors



Heritage Society

As a legacy donor, you will be a member of our **Heritage Society** and receive:

- A Certificate of Appreciation and a special gift commemorating our founders.
- A listing in the Heritage Society Honorary Registry (You can choose to be anonymous or to include a tribute in memory or honor of a Sister or loved one.)
- Prayers for the repose of your soul and remembrance in annual masses or prayer services.
- Recognition at donor receptions and other special events.
- Our exclusive *Mission and Ministry* newsletter.

Information for Your Advisor or Plan Administrator

Legal Name: Congregation of the Sisters of St. Joseph

Federal Tax ID (EIN): 83-0481134

Address (Choose One):

1515 West Ogden Ave.
LaGrange Park, IL 60526

2929 Nazareth Road
Kalamazoo, MI 49048

3430 Rocky River Drive
Cleveland, OH 44111

137 Mt. St. Joseph Road
Wheeling, WV 26003

To Learn More or to Share Your Plans

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