

THE IMPORTANCE OF WILLS & TRUSTS



Now, more than ever, *legacy planning* is a way to lift the stress and uncertainty surrounding many of our Catholic organizations.

\$40 TRILLION

We are undergoing the greatest transitions of wealth in modern history. The Baby-Boomer generation holds 90% of all wealth in the US. Over \$40 trillion of wealth will be transferred from one generation to another.



Now is the time to speak to your donors about considering *your organization* as one of their children in their estate plan.

ASK YOURSELF THIS QUESTION:

How many of your key donors passed away this year? Of those donors, how many left your organization an *end of life gift*? The answer is probably not many. This is why these conversations are becoming more and more prevalent today.



THE SOLUTION:

The Foundation offers complementary Wills & Trusts seminars. We have a group of Catholic estate planning attorneys who volunteer their time to Catholic organizations. In these sessions, donors will learn about Arizona law regarding wills & trusts and why leaving your parish, charity, or school in their will or trust is important.

CALL TO ACTION

Contact the Catholic Community Foundation today to schedule your complimentary Wills & Trusts session for your organization.

480.651.8811

