

How do planned gifts fit in with an overall giving plan?

For individuals who support our Catholic schools' mission and wish to maximize their financial support, planned giving can be part of a "triple gift" plan:

- 01. Renewable annual gift to the MACS Fund**
- 02. Capital campaign gift**
- 03. Planned estate gift**



Please contact Advancement Director Libby Leinenkugel '94 to learn more and discuss your giving plan.

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715.723.0538 x 3306

LEAVE YOUR LEGACY

Planned giving at
McDonnell Area Catholic Schools





Planned Giving

What is it?

Planned giving allows individuals to use their estate plan and other gifts to provide financial support to nonprofit organizations. Additionally, an individual need not be of a particular age or income to make a planned gift and leave a legacy.

McDonnell Area Catholic Schools deeply appreciates our alumni and supporters who have given prayerful consideration to leaving a legacy for our schools through planned giving. "For where your treasure is, there also will your heart be." (Mt. 6:21) On McDonell!



How can I make a planned gift to McDonell Area Catholic Schools?

Planned giving may take the form of a bequest in the donor's will or estate plan designating "McDonell Area Catholic Schools, Inc." as a beneficiary. For example, the estate plan may state a specific dollar amount or percentage of the estate gifted to the school system.

Planned gifts may also include gifts of stocks or bonds, life income gifts, life insurance policies naming the school system as a beneficiary, etc., and often provide tax advantages to the donor. Planned gifts require thoughtful reflection and, often, the input of a financial advisor or attorney. MACS is not able to provide legal or financial advice.

www.McDonellAreaCatholicSchools.org

What is the McDonell High School Foundation, Inc.?

The Foundation is a 501(c)(3) Perpetual Fund, whose sole purpose is the support of McDonell Area Catholic Schools. The Foundation has historically been able to disburse investment earnings in the range of 4-5% of principal annually, without jeopardizing the corpus of the fund. Individuals choosing to have their funds endowed in perpetuity have the option to designate "McDonell High School Foundation, Inc." as a beneficiary. All funds are invested and distributed with controls in place to ensure prudent stewardship.

Important note: "Chippewa Area Catholic Schools" should NOT be designated as a beneficiary.



McDonell foundation