

Please Remember the Church in Your Estate

We know we won't be "here" forever, but we know our Catholic faith will always be here for us. Please pray for the Church and think about ways you can benefit future generations of the faithful through your estate. It's a way of expressing our gratitude for all the blessings you have stewarded in your lifetime.



FOUNDATION
for the Diocese of Helena
(406)389-7050 fdoh.org
foundation@dohmt.org

Bequests can be made as . . .

- a specific dollar amount
- a percentage of your estate
- a specific asset
- a beneficiary designation of certain assets
- the balance or residue of your estate

Sample Bequest Language

A BEQUEST FOR GENERAL PURPOSES:

TO THE DIOCESE: "I give ____% of my disposable estate (or, specify a specific dollar amount, or specific asset) to The Roman Catholic Bishop of Helena, a Montana corporation sole, taxpayer ID number 81-0231797, to be used for religious and charitable purposes."

TO THE FOUNDATION: "I give _____% of my disposable estate (or, specify a specific dollar amount, or specific asset) to The Foundation for the Diocese of Helena, a Montana nonprofit corporation, taxpayer ID number 81-0449307, to be permanently endowed for religious and charitable purposes."

TO A PARISH: "I give _____% of my disposable estate (or, specify a specific dollar amount or specific asset) to _____ Parish located in _____, Montana, Taxpayer ID number _____, to be used for religious and charitable purposes."

TO CLERGY RETIREMENT FUND: "I give _____% of my disposable estate (or, specify a specific dollar amount, or specific asset) to the Clergy Senior Status and Security Trust, located in Helena, Montana, Taxpayer ID number 51-7446423, for the benefit of retired clergy in the Diocese of Helena."

A BEQUEST FOR A PARTICULAR PURPOSE:

Use the same wording as above, but in place of "religious and charitable purposes," specify the purpose or area of ministry toward which the bequest is to be used. For example:

"I give 5% of my disposable estate to The Roman Catholic Bishop of Helena, a Montana corporation sole, taxpayer ID number 81-0231797, to be used for seminarian education."

"I give \$10,000 to The Foundation for the Diocese of Helena, a Montana nonprofit corporation, taxpayer ID number 81-0449307, to be permanently endowed for the benefit of my parish, the Cathedral of St. Helena, located in Helena, Montana."

"I give 10% of my disposable estate to _____ Parish located in _____, Montana, Taxpayer ID number _____, to be used for youth ministry."

REMAINDER OF ESTATE OPTION: Use the same wording as above, but in place of a percentage, specific dollar amount, or specific asset, use the following: *"After payment of all my just debts, funeral expenses, taxes, and the specific bequests set forth above, I give, devise, and bequeath all the rest, residue, and remainder of my estate, both real and personal, to ..."* and finish with applicable language from above.

Please consult with your attorney as the professional qualified to offer counsel in regard to your estate planning.