

MISSION



HIGHLIGHTS

Creating a Legacy of Charity

CONGREGATION OF THE MISSION WESTERN PROVINCE

Take Control By Planning Ahead

You can't predict the future, so it's tempting to put planning on hold. Unfortunately, loose ends can lead to future stress and rash decisions.

Consider this: Planning under "normal" circumstances allows you to slow down and consider your options. For example, taking the time to be mindful when creating an estate plan gives you the opportunity to record your values and make sure your wishes are followed. A thoughtful estate plan can also tell your story through the causes you support after your lifetime.

A WELL-PLANNED ESTATE HELPS YOU

- + **Make the most of your assets.** Meeting with qualified professionals helps you grow your wealth over the long term.
- + **Protect family and loved ones.** An up-to-date estate plan keeps loved ones safe. Reviewing it regularly means adjusting for changes in personal relationships, tax laws, births, deaths, and state of residence.
- + **Be tax smart.** Certain assets can be tax burdens (or at least tax surprises) to your family. Planning helps keep your loved ones in the loop and possibly avoids a tax hit altogether.
- + **Continue helping others after your lifetime.** Gifts to the Congregation of the Mission Western Province may provide you financial benefits in addition to the fulfillment that comes from helping us reach the poor, serve the lonely and abandoned, and evangelize the least of God's people.



We Can Help

By planning your estate now, you not only support your loved ones but also ensure the organizations you care about, like the Congregation of the Mission Western Province, continue to receive your support. Contact Jeanne Rudolph at 314.373.8513 or jrudolph@vincentian.org to learn more about including the Vincentians in your future plans.

7 Items Your Estate Plan May Have Left Out

If you're taking another look at your existing estate plan, or just starting your planning journey, be sure to include the following items – in addition to a will – to make things easier for you and your loved ones. In most cases, you won't need to involve an attorney.

BE SURE YOU HAVE

- 1** A **high-level overview** that lays out the basics of your finances and plans. Include
 - + Where to find your will and other documents, and identities of your key contacts – your agents under the powers of attorney and executors or personal representatives.
 - + Financial assets (where accounts are held and who owns them).
 - + Insurance coverage (property/casualty, health, life).
 - + Property and vehicle information.
 - + Regular household bills that you pay.
- 2** A **detailed description of your finances** (account numbers, contacts at financial institutions, etc.).
- 3** A **personal property memorandum** that is referenced by your will and states how you want property distributed and/or sold. This allows you to assign sentimental or valuable assets to specific people without having to change your will if you change your mind.
- 4** A **plan for your pets** to ensure that your furry friends are cared for. A legally binding pet trust can be created, or you can make provisions in your will for how you want your pets taken care of in your absence.
- 5** Your **digital estate plan**, which includes online account details.
- 6** **Advance directives, powers of attorney, and other end-of-life planning tools** to communicate your basic wishes. Add personal messages and detailed plans for your funeral, memorial, and other specifics.
- 7** An **ethical will**, which is your opportunity to hand down your values in a document or video. Think of it as a personal record of your life.

Explore Your Legacy at the Congregation of the Mission Western Province

Wherever you are in the process, your estate plan is a powerful way to show your love for your favorite causes, such as the Congregation of the Mission Western Province. Please contact Jeanne Rudolph at 314.373.8513 or jrudolph@vincentian.org to learn more about including us in your future plans.



Organize Your Important Papers

Do your loved ones know where you keep your important papers? Send for ***Your Guide to Locating Important Documents***, a FREE resource to help you list all of the vital information they may need, giving them – and you – peace of mind. Return the reply card today to get yours.



Write Your Philanthropic Autobiography

Taking time to think about and document what's important – and why it's important – can help you connect more deeply with the people and places you hold dear.

For example, caring supporters of the Congregation of the Mission Western Province share a commitment to caring for the poor, giving generously, and evangelizing those that Jesus called the least among us.

Here are some ideas for how you can forge more meaningful connections and pass along your generous spirit.

- + Have you done an activity recently that made you happy? Consider a cause related to that activity. For example, if you enjoy a particular hiking trail, find a local conservation group to support.
- + If you feel connected to a current event, see if nonprofits you support are responding and ensure they are set up for success.
- + Go beyond dollars and cents. Volunteering is a great way to give back, especially for local charities that may not have access to the same type of administrative staff as their larger counterparts. Also, inviting friends and family can be an effective way to introduce them to your passions.
- + Your values can unlock others' generosity. Letting loved ones know what you care about can help you connect. It could even bring them to support the causes you cherish.

Tell your story by keeping a running document (a generosity journal or ethical will) that gives an account of to whom you gave, why you gave to that nonprofit, how it made you feel, and how that nonprofit's mission fits into your overall value system.

Another Expression of Your Values

Your will is your legacy. It dictates how you will be remembered and can be created to reflect your values. That's why, no matter your age or wealth status, you should take time to consider this important document this year.

For example, there's an easy way for you to continue supporting the Vincentians without giving anything today: by including a gift to the Congregation of the Mission in your will.

Your estate plan is a powerful way to show your love and support of the service and outreach of the Vincentians. To learn more about ways a gift in your estate plan can make an impact for those we serve, contact Jeanne Rudolph at 314.373.8513 or jrudolph@vincentian.org.



As you make plans for the future, please consider a legacy gift to the Vincentians.

Contact Jeanne Rudolph to learn more.



CONGREGATION
OF THE MISSION

Western Province

3701 Forest Park Avenue
Saint Louis, MO 63108

Jeanne Rudolph
Director of Major Gifts
314.373.8513
jrudolph@vincentian.org
vincentian.org

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Giving Back Together

Judy and Bill Pittman's Legacy of Generosity

St. Vincent de Paul once expressed, "If God is the center of your life, no words are necessary. Your mere presence will touch hearts." That was certainly true of Judy and Bill Pittman, kind friends of the Vincentians throughout their lifetime.

A devout Catholic and remarkable businesswoman, Judy made a lasting impact wherever she went, notably in the area of high-rise real estate in Dallas and as a generous philanthropist.

Bill was ordained a priest in 1949 and held diverse ministry roles, including teacher of Latin and Greek, chaplain to De La Salle Boys' School and St. Stephen's Girls' School, and pastor of multiple parishes.

After celebrating his 30th anniversary of priesthood at Holy Trinity in Dallas, Bill requested laicization from the Holy Father, which was granted, and later married the love of his life, Judy.

Bill and Judy traveled the world together but never forgot where they came from. They graciously shared their blessings with others, especially at their parish, Holy Trinity, and through their annual gift to the Vincentians to benefit the poor. Even in death, they expressed their gratitude for the role the church played in their lives, by supporting the Vincentians with a legacy gift in their will.

Close friend and pastor Father Milton Ryan, C.M., shares, "They couldn't give enough. If you even hinted at a need, they were there. The Vincentian community is thriving because of the generosity of people like Bill and Judy who are inspired to give."