



Catholic
Community
Foundation

A LASTING LEGACY

INFO SHEET

Create a Lasting Catholic Legacy Through a Named Fund: When it Makes Sense

1. You want clarity and simplicity for your family and heirs

If you support multiple charitable causes, a Named Fund organizes everything under one roof. Rather than listing numerous charities across wills, trusts, or beneficiary forms, your giving is consolidated into a single, coordinated plan that is easy to understand and administer.

2. You want your faith to guide your legacy

Your fund is overseen by a trusted Catholic fiduciary that understands stewardship, donor intent, and the moral teachings of the Church. This provides peace of mind that your wishes will be honored faithfully and responsibly, even long after your lifetime.

3. You want control and flexibility without legal complexity

Life changes, and so can your charitable priorities. A Named Fund allows you to revise beneficiaries, percentages, and purposes at any time without the expense and burden of amending a will or trust.

4. You want to define how, when, and why your gift is used

You may document specific, personalized guidance for your fund, such as:

- Supporting a scholarship or specific ministry
- Creating or contributing to an endowment
- Restricting use until certain conditions are met
- Identifying who may recommend or authorize grants (including future generations of your family)
- Requesting continued prayers or masses held in your name

Your instructions are clearly documented and stewarded with care.

Additional Benefits to Consider

- A lasting family legacy: Your fund may continue for generations, allowing children and grandchildren to remain connected to your values.
- Centralized administration: The Foundation handles recordkeeping, compliance, distributions, and reporting.
- Recognition and remembrance: Your Named Fund serves as a permanent expression of your family's commitment to faith and community.

Your trusted charitable experts

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