

3 EASY WAYS TO

# Make a Planned Gift



April 2023

1

## Bequests

Next time you are working on your estate plans, please include The Fund for the Diaconate of The Episcopal Church in your will. If you have had any major changes in your family – marriage, divorce, or death of a close family member, children born or reached maturity, relocation – it is time to revisit your estate plans.

To ensure that your intentions are absolutely clear, please use The Fund’s legal name, address, and tax ID number (below).

2

## Qualified Charitable Distribution from your IRA

If you are at least 70½ years of age, you may direct your retirement plan manager to send up to \$100,000 of your IRA to The Fund, as an IRS qualified charity. If you are at least 72 years old, doing so will avoid your having to pay income tax on that portion of your Required Minimum Distribution (RMD).

The IRS provides detailed information. Visit [www.irs.gov](http://www.irs.gov) and search for “qualified charitable distributions” or use this link [tinyurl.com/3wmtn35s](http://tinyurl.com/3wmtn35s).

3

## Pension Beneficiary Designation

Naming The Fund as the beneficiary of your retirement account can be a wonderful and tax-efficient way to make a legacy gift to support future Deacons in financial need, thus supporting a Diaconate that is so important to you. It is relatively simple to make a gift using the beneficiary designation form provided by the financial institution that serves as the retirement plan administrator or custodian.

Be sure to use the legal name, Tax ID number, and address for The Fund (below). Other considerations: Get your spouse’s consent; Use a percentage rather than a fixed dollar amount, as investment performance may change.

*This page is not intended as legal or financial advice.  
Please contact your own legal or financial advisor before making these decisions.*



Questions? Contact  
[treasurer@fundfordiaconate.org](mailto:treasurer@fundfordiaconate.org).

Planned Giving to The Fund for the Diaconate enables us to provide assistance to deacons - working, retired, in formation or disabled - who have insufficient funds for their needs.

The Fund for the Diaconate of The Episcopal Church  
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