

Providing for the Financial Security of Serra Catholic School



Planned Giving *“A Gift of a Lifetime”*

“A hundred years from now, it will not matter what my bank account was, the sort of house I lived in, or the kind of car I drove... but the world may be different because I was important in the life of a child.”

Author unknown



**Serra Catholic School
Office of Development**



What is Planned Giving?

Planned Giving is simply any gift made with thought given as to how the gift will impact the donor's financial and estate plans. Planned gifts are generally the easiest way to make the greatest impact on an institution.

Different types of planned gifts achieve different objectives, such as minimizing current taxes, supporting an institution you care about while providing for your heirs, increasing current income or minimizing a future estate tax burden.

Ways to Give

- Current Income***....Cash or check
- Securities***Transferring stocks in a corporation (*please contact our office for instructions*)
- Life Insurance***Serra named as a beneficiary
- Real Estate***Individual homes or other real estate property
- Trusts***.....Charitable remainder trusts, pooled incomes, donor advised funds and/or lead trusts
- Retirement Plans***..Serra named as a beneficiary
- Bequests & Wills***..Your attorney can assist you in naming Serra Catholic School in your will or family trust.

Other giving opportunities are welcomed, and all donations are greatly appreciated.

A Message from Our Principal

Not long ago, it was the dream of our founding families that Catholic education be available for the children of the parishes of San Francisco Solano, Santiago de Compostela, and St. Kilian. Through the generosity of many who have given their time, talents, and treasures, the dream became a reality with the opening of Serra Catholic School in 1995.

With the guidance of the Lord, Serra has become one of the largest Catholic elementary schools in the country, serving as a role model for other communities and parishes.

Our mission continues to be that of instilling in each student a positive and realistic self-image, a life-long love of learning, a reverence for his or her physical being, a Catholic faith-filled and missionary spirit, and a willingness to share God-given gifts with others.

As educators, we recognize the unique potential of each student and work to establish a personalized education plan for each student, ensuring his or her educational success.

We look to your support, as a member of the Serra Community, to help us continue our commitment to our students' spiritual growth, to academic excellence and to a secure and stable financial future.

I thank you for your interest in Serra, and your consideration to contribute through our Development Program.

Serving Christ's children,



Angeline Trudell
Principal

Tax Benefits

- Avoid estate taxes
 - Current deduction for the present value of the remainder interest while receiving annual annuity payments
 - Current deduction at the value of an appreciated asset while not paying capital gains
- * *Serra Catholic School urges you to contact your tax advisor.*



“So we, through memory, are one body in Christ since we have gifts that differ according to the grace given to us.”

(Romans 12:5)



Serving the Parishes of:

San Francisco Solano Catholic Church, *Rancho Santa Margarita*
Santiago de Compostela Catholic Church, *Lake Forest*
St. Kilian Catholic Church, *Mission Viejo*

For more information, please contact us:

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