



Leaving a Legacy

Prayerfully consider supporting the future of the Women's Ordination Conference to empower the next generation of women leaders working for equality in our Church.

With my 60th birthday looming, and a dear friend just having died suddenly, denial of my mortality is getting harder to achieve. Thoughts of what I want to accomplish in my lifetime are coming to mind. What is most important in my life and how can I continue to make a difference?

I decided that by making a bequest to the Women's Ordination Conference (WOC) in my will, I could continue to make a difference in the lives of those I love.

Many of us have given years of our lives to bettering conditions for women in the church and in the world. Now the torch is being passed. I watch with great pride and admiration as younger women are leading the organization and the movement.

By leaving a bequest to WOC, my children will know how important it is to continue to speak up for what you believe in, to never give up, and to put your money where your mouth is.

When you make a legacy gift, you are ensuring that the mission you care so deeply about—the ordination of women as priests, deacons, and bishops into an inclusive and accountable Catholic Church—will continue to be fulfilled.

— *Gerry Rauch, former WOC board president*

Beneficiary Designation

A beneficiary designation is one of the simplest ways to make a gift to the Women's Ordination Conference. It's as easy as filling out a form.

You can specify the individuals and charities you want to support and you can also specify the percentage of the assets you want each beneficiary to receive.

Beneficiary designations are available when giving the following assets:

- **Retirement Assets:** You can make the Women's Ordination Conference the beneficiary of your retirement assets. This type of gift is simple because you can control the transfer of these assets at your death without changing your will or living trust. All you need to do is complete a new beneficiary designation form from your plan administrator. There is no need to modify your will or living trust.
- **Life Insurance:** Life Insurance policies can also be used to make a gift to the Women's Ordination Conference. Obtain the appropriate form from your insurance agent and return to your insurance company a form designating that the Women's Ordination Conference Tax ID# 52-1107945 receives all or a portion of the death benefit associated with your life insurance policy.
- **Commercial Annuity Contracts:** A commercial annuity will sometimes have a remaining value at the end of the annuitant's lifetime. You can name the Women's Ordination Conference, Tax ID# 52-1107945 as a beneficiary to receive all or part of this amount by completing the appropriate form from the insurance company.
- **Bank Accounts:** You can instruct your bank to pay the Women's Ordination Conference Tax ID# 52-1107945 all or a portion of what remains in a checking or savings account as a transfer of assets at death. Your bank will provide you with the appropriate beneficiary designation form.
- **Investment Accounts:** You can instruct your investment company to transfer to the Women's Ordination Conference Tax ID# 52-1107945 some or all investments held in the account at the time of your passing. Your broker or agent will let you know the process for doing this.

Gifts of Securities

Gifts of appreciated securities are tax deductible at full fair-market value if the donor has owned the asset for at least one year. To avoid capital gains taxes, you must provide the securities themselves, not the proceeds of their sale. These gifts may be deducted at fair market value on the date of transfer to the Women's Ordination Conference.

Bequests in Wills or Living Trusts

If you have not yet prepared a will, you should do so for a number of good reasons. It is simple for your attorney to incorporate gift language as a part of the drafting process, using the sample language we provide below. If you already have a will, your attorney can draft an amendment to your will for a minimal charge. A gift can also be easily incorporated into a revocable living trust.

- Retain full ownership and use of your assets throughout your life. Perhaps you want to make a gift to support the Women's Ordination Conference but are not in a position to draw upon resources you may need in the years ahead. A bequest allows you to make a gift while preserving your financial security.
- Flexible. A gift is not set in stone and can be changed if your life circumstances change.
- Possibly reduce taxes payable by your estate. A bequest to the Women's Ordination Conference results in a dollar-for-dollar estate tax charitable deduction.

Several types of bequests are possible:

- General, for a certain dollar amount — “the sum of \$25,000”
- Specific, a particular asset — “1,000 shares of XYZ stock”
- Residual, once other assets have been distributed — “fifty percent of the rest, residue, and remainder of my estate”
- Contingent, only under certain conditions — “in the event my spouse does not survive me”

Bequest Language

“I give to the WOMEN'S ORDINATION CONFERENCE, in Washington, D.C., a 501(c)(3) tax-exempt, charitable organization, or its successor, Federal Tax Identification Number: 52-1107945, (___% of my residuary estate) or (all of my residuary estate) or (the sum of \$) to be used for the benefit of the Women's Ordination Conference as the directors may direct.”

Retirement Assets

A gift of retirement plan assets can be a surprisingly easy way to reduce potentially very high taxes and provide support to the Women's Ordination Conference. A gift of retirement plan assets could be right for you if:

- You have an IRA or qualified retirement plan, such as a 401(k) or 403(b).
- You do not expect to use all of your retirement plan assets during your lifetime.
- You have other assets, such as securities and real estate, that you want to pass to heirs.
- You may want to provide payments to loved ones after you are gone.

Option 1: Make a tax-free gift with an IRA charitable rollover

You can make a tax-free gift from your traditional IRA (other qualified retirement plans such as 401(k)s and 403(b)s are not eligible). You must be at least 70 ½ years old to take advantage of this opportunity. You must transfer your gift directly from your IRA administrator to the Women's Ordination Conference. The total of all of your rollover gifts in any one year cannot exceed \$100,000 per person. A spouse with a separate IRA could also make a rollover gift of up to \$100,000 if they otherwise qualify.

The benefits of an IRA charitable rollover gift include:

- Satisfies the required minimum distribution but is not included in taxable income
- Avoids income tax on IRA withdrawals
- Supports the important work of the Women's Ordination Conference with a tax-free gift

Option 2: Designate remaining retirement plan assets for the Women's Ordination Conference

You designate on your IRA or qualified plan beneficiary designation form the beneficiary of all or a portion of what remains in your retirement plan when the plan ends. In addition to having the satisfaction of making a significant gift to WOC, your benefits include:

- Savings on federal and state taxes that can total 39.6% or more.
- Preservation of non-retirement plan assets for family.

Option 3: Designate remaining retirement plan assets for a life income plan

You can designate on your IRA or qualified plan beneficiary designation form that the assets remaining when your plan ends be used to fund a gift arrangement that will make payments to family members or other loved ones for the rest of their lives. When the gift arrangement ends, what's left goes to WOC.

Legal Name

All charitable gifts should be directed to the “Women’s Ordination Conference,” a District of Columbia 501(c)(3) tax-exempt, charitable organization, or its successor, Federal Tax Identification Number: 52-1107945.”



Tax ID Number

The Women’s Ordination Conference Tax ID number is 52-1107945.

If you and/or your advisor arranges an estate gift for the benefit of Women’s Ordination Conference, we would very much appreciate knowing about the gift, both so we can express our sincere gratitude and so we can make sure we will be able to fulfill your wishes. Of course, we respect the fact that in some cases, donors prefer to remain anonymous.

Wire Transfer Instructions

The following are instructions you will need to transfer your securities via DTC to the Women’s Ordination Conference.

DTC #0443

T. Rowe Price

For Credit to Account #30Q52027-9

Client Account Name: Women’s Ordination Conference

Please be sure to contact the Women’s Ordination Conference when transferring securities so that we know to look for its arrival. Contacting your broker alone may not insure proper or timely gift crediting.

Contact WOC

Finally, we want to be of assistance to you and/or your advisor in any way we can, whether you are simply looking for general information about charitable giving, are considering particular options, or need our cooperation in the administration of a bequest or other type of planned gift.

Contact us at 202-675-1006 or WOC@womensordination.org

Women’s Ordination Conference
PO Box 15057 Washington, DC 20003 USA