

Planned Giving



BISHOP CHATARD HIGH SCHOOL

How does Planned Giving help you, and preserve the Bishop Chatard experience?

When you value the education and experience that Bishop Chatard High School provides, and want to help secure its future, please consider arranging for a charitable gift. Regardless of your income level, you can make a significant contribution to Bishop Chatard by planning a donation. Planned or deferred gifts are designed to help donors enhance their estate planning, tax planning, investment objectives and retirement needs while helping to ensure the future growth of Bishop Chatard.



How to make a Planned Gift

You don't have to be a certain age or extremely wealthy to leave a legacy. You can construct your planned gift now and have it take effect after your lifetime, or your planned gift can be set up to provide income during your lifetime while assigning the remainder to Bishop Chatard High School.

You can give different kinds of assets, give them in different ways, and strategically plan so that you can do more for Bishop Chatard while doing more for yourself. As a result, you can experience the joy of giving and leave a legacy that will be remembered for generations to come. **Your tax advisor or planning professional will be able to assist you as you contemplate a planned gift.**



Gifts payable upon donor's death

Bequest by will: Including a charitable bequest in your will is a simple way to make a lasting gift to Bishop Chatard. You can leave a bequest to Bishop Chatard by adding to an existing will or drafting a new one. Make a gift of a stated dollar amount, specific property, a percentage of your estate, or the remainder after distributions to other beneficiaries.

Life insurance: A simple way to give a significant gift

Beneficiary designation: Bishop Chatard is designated as the beneficiary of the life insurance policy to receive death proceeds. Bishop Chatard can be designated to receive 100% or a fractional percentage of the proceeds, and can be either the primary or contingent beneficiary.

Transfer of policy: Ownership of a paid-in-full life insurance policy can be transferred to Bishop Chatard, or ownership of a policy can be transferred while the donor continues to pay the premium.



Gifts that return income to the donor

Charitable Remainder Trust: This trust permits you to remove assets from your real estate and benefit Bishop Chatard during the trust's term. Assets selected by you are transferred into a trust, which pay Bishop Chatard an annual amount to accomplish its mission.

Charitable Gift Annuities: Lifetime payments provided in exchange for donor's charitable gift, governed by the terms of an annuity contract between Bishop Chatard and the donor.

Gifts that use Appreciated Assets

Charitable Lead Trust: A trust that makes annual payments to Bishop Chatard for a term of years and thereafter passes the assets back to the donor or the donor's children or grandchildren. The payments may be fixed percentages or fixed dollar amounts, and the amount depends upon the donor's age, amount of the gift and applicable federal rate.

Real Estate: By deed, a donor can transfer either their entire estate or a fractional interest in real estate. The value of the interest transferred generates a charitable deduction to offset potential capital gains.

Retirement Assets: Designate Bishop Chatard as beneficiary of a retirement account. It is particularly advantageous to assign retirement accounts to a charitable beneficiary to avoid potentially significant tax consequences when the retirement assets are received by your family members or other designated beneficiaries.

We welcome the opportunity to discuss your planned gift to Bishop Chatard.

Contact Margaret Ruffing at 317-251-1451 x 2242 or mruffing@bishopchatard.org for more information. We also recommend you consult with your tax advisor or planning professional.

How your donation supports the mission of BCHS

For over a half a century, Bishop Chatard has held fast to her mission of providing a meaningful and authentic Catholic education for the families of the North Deanery of Indianapolis. Always embracing ever-changing needs, challenges and opportunities, we have counted on the generosity and legacy of our community, both past and present.



We at Bishop Chatard are deeply honored when we receive charitable donations. We ensure that your gifts are used responsibly and in a manner that goes directly to the core of supporting our mission. All gifts and donations enable the school to provide much-needed tuition assistance to our deserving students, to furnish support for faculty enrichment and retention, and to steward the properties and facilities that make up our campus.



For we brought nothing into this world, and it is certain we can carry nothing out.

~ 1 Timothy 6:7-8;

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AVE MARIA LEGACY SOCIETY

While we may not receive the gift for years to come, we are deeply appreciative to those that generously and faithfully chose a planned gift to support our Bishop Chatard mission. When you let us know of your planned gift intentions, you become a member of our newly formed Ave Maria Legacy Society.

Benefits of membership in the BCHS Ave Maria Legacy Society include:

- Invitation to Ave Maria Legacy Society Mass and reception with the president of Bishop Chatard High School
- A lifetime Trojan Friendship Pass allowing access to home athletic games and drama productions
- A listing in our Annual Report as a member of Ave Maria Legacy Society



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