

Giving Opportunities

Outright Gifts • Memorial And Honorary Gifts

Requests

In writing your will or living trust, you may specify that you would like a portion of your estate to benefit St. Mary's.

Gifts of Securities

Gifts of stock or other appreciated property offer two-fold tax savings: Donors pay no capital gains on the increased value of the appreciated security, and they receive an income tax deduction for the full market value at the time of the gift.

Gifts of Real Estate

Real property, either in entirety or in part, can be deeded to St. Mary's. It is even possible to arrange a sizeable tax deduction by deeding a home or farm to the school now, while continuing to occupy the property for life.

Gifts of Life Insurance

A donor unable to make a large gift from currently available funds may wish to make a pledge by purchasing a new whole life insurance policy naming St. Mary's as the recipients, or by transferring ownership of an existing policy to St. Mary's.

Charitable Remainder Trusts

You may transfer money, securities or other property in trust of St. Mary's and receive income for yourself (and another) for life. You receive immediate tax benefit and a steady stream of income, and ultimately St. Mary's receives the trust property.

Charitable Lead Trusts

Almost the opposite of a Remainder Trust, you transfer your appreciated property or securities to a trust, with St. Mary's receiving the annual income interest for a period of time. At the end of this period, the remaining funds return to you or your designated beneficiary.

Planned Notification

I have remembered St. Mary's High School in my will/trust.

Name _____ Class _____

Address _____

City _____ State _____ Zip _____

Telephone _____

For more information, please contact the Development Office at 209-957-3340 extension 180.

- You may use my name to promote planned giving for the school.
- I prefer to remain anonymous.

Please return this form to:
Development Office
St. Mary's High School
P.O. Box 7247 • Stockton, CA 95267