



Good Stewards

Estate & Gift Planning Ideas for Friends of the Priests of the Sacred Heart

The Sacred Heart Gift Annuity, the gift that gives back... *Five Annuitants: Why They Did it!*

Many of our devoted friends look for meaningful ways they can support the mission and ministry of the Priests of the Sacred Heart.

Because of friends like you, we are able to do so much for so many, here in the U.S. and around the world in 41 different missions.

The Sacred Heart Charitable Gift Annuity program gives you a way to help us while providing income for you or a loved one, along with a number of other financial and spiritual benefits.

Here are a few comments from some of our Sacred Heart Gift Annuitants:

"We could have received a higher annuity rate with another place, but we wanted to give the money to a charity that we cared about and who we felt were good stewards of our donations." Art and Marsha, AZ

"I am a single lady, have no heirs, and a gift annuity guarantees income for me and hopefully helps someone in need." Grace, CT

"I wanted to help your work. With this program I receive some money back in case I need it. I'll have it or I can donate it." Shirley, MN

"I would recommend this program. Helping the poor, preaching God's word throughout the world and educating men for the priesthood is what the Sacred Heart Monastery is all about." Veronica, WI

"I am supporting God's work without decreasing my children's inheritance (they are each named as survivor). The service could not be better. Every payment has arrived on time since 1996." Margaret, TX

The Sacred Heart Charitable Gift Annuity is a simple contract between you and the Priests of the Sacred Heart that promises:

- Fixed payments, guaranteed for life
- A safe and secure history
- Income tax benefits
- Competitive rates of return
- Spiritual satisfaction

Limited-time rate increase!

For over 80 years we have offered our friends charitable gift annuities to further our mission. And we have done well with conservative investments that ensure our reserve while maintaining normal market fluctuations.

In fact, we have done so well that we are able to offer you the possibility of a higher than normal rate of return on new annuities taken by December 31, 2015!

Contact Pam at 1-866-268-0157 or through email at pmilczarski@poshusa.org, or use the enclosed card to request a free, no obligation illustration on how an annuity can work for you.



Help us feed the needy with the power of God's love

Fr. Leo Dehon, scj, the founder of the Priests of the Sacred Heart wrote:

*"Good Master,
you have given me the grace to begin loving you:*

Give me also the grace to persevere in your love, cost what it may.

In the spirit of love I wish to offer to you constantly my daily actions, works, and sufferings. Amen."

In this month of the Holy Rosary we ask the Blessed Mother to help us to persevere in that very love – now, and at the hour of our death."

L. Dominic scj

What Estate Documents Do You Need to Put in One Place?

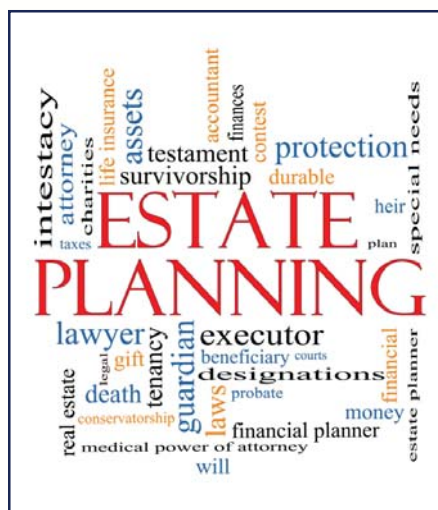
Experts agree there are more than 25 documents you need to have in place and available to those who will see that your final wishes are carried out, leaving a legacy in your name.

You may wonder who, what, where and when to get this all accomplished! It can seem like a daunting task! We want to help you get through this process with the least amount of anxiety and expense.

We have available for you, *free of charge and with no obligation*, tools to accomplish your goals. You can choose to have them mailed to you or you can go right to our website, www.poshgift.org, and find information at your fingertips.

You can also view 12 new videos about estate planning and healthcare, as well as find important tools to help you leave your legacy. You will have all of your questions answered and have the ability to securely capture your information to share with whomever you wish.

No computer, no problem. Use the enclosed form to request our free estate planning series!



Looking for Ways to Maximize Your End of Year Gifts?

Thinking of making a tax-deductible gift to the Priests of the Sacred Heart at year end? Here's how to get the most from your charitable giving:

- **Matching Gifts** – Did you know that your gift of \$50 can be matched with an additional \$50 or whatever amount your gift is? Many companies have a “Matching Gift” program to encourage charitable giving by matching what their current or sometimes former employees contribute. Check today with your employer to see if your gift can be matched!
- **Donor Advised Funds or DAF** – A DAF allows donors to make a charitable contribution, receive an immediate tax benefit and then recommend grants from the fund over time. Your advisor or bank can direct you to a program that would work for you.
- **Cash Donations** – You may reduce or eliminate income tax up to 50% of your adjusted gross income. Larger gifts can also result in tax savings for the year the gift is made and as many as five future years!
- **Gifts of Assets** – If you have owned property such as stock for longer than 1 year, you can make a gift of that asset and deduct the full current value while avoiding capital gains tax by giving this gift to a charity such as the Priests of the Sacred Heart. You may reduce or eliminate income tax up to 30% of your adjusted gross income and may be eligible for tax savings

for the year the gift is made and as many as three future years. While assets that have increased in value are your best bet in giving to charity, there are options for assets that have decreased in value.

Example:

Stock gift example: Linda and Bruce are making their list of charities for year-end gifts and have decided that they will make gifts of stock that have increased in value that they have owned for a number of years.

If they sell the stock, Linda and Bruce would be taxed on the capital gain due to the increase in value. However, because they have owned the stock for more than 1 year and are making this gift to the Priests of the Sacred Heart, they will receive a charitable deduction for the full value and will bypass the capital gain.

Cash gift example: Cheryl has decided that she would like to make a gift of \$1,000 this year to the Priests of the Sacred Heart. Cheryl is in the 33% tax bracket and making this gift can save her up to \$330 in taxes that would otherwise be due. If she pays state income tax in addition to Federal, her savings may be even greater.

Remember to make your gifts before December 31, 2015 to qualify for tax savings this year!

While we would be happy to discuss these options with you, we suggest you ask your financial advisor or attorney when making financial decisions.

Devotion in Action!

Every day I hear from such devoted and loving people that not only touch my heart but fill it with so much joy!

One donor recently shared with me that in her instructions for her funeral, the 30 Sacred Heart pins she purchased should be given to each of her family members to wear as well as one to be placed on her burial dress, and that any donations for Masses on her behalf be sent to the Priests of the Sacred Heart.



Faith Heals All

In 1999 Susan was at her job when hot oil severely burned her hands and feet. She was told that she would never walk again. In 2000 Susan received a Sacred Heart medal and wore it faithfully each day promising to spread devotion to the Sacred Heart. Today, Susan believes that her ability to walk is her reward by the grace of God. "Faith heals all, and for all whom believe" states Susan. "I carry two medals with me all of the time so that I can share the love of His Sacred Heart. I have given out at least 50 medals to those who suffer in hopes that they too will know His love".

Plane tickets for volunteer hours

Cathy, a long-time volunteer with the English as a Second Language (ESL) program at Sacred Heart Seminary and School of Theology, as well as with the Province Development Office, also works for Southwest Airlines. The airline has a program in which their employees can earn free plane tickets for their charity of choice by racking up volunteer hours.



After counting up the many hours she had donated to ESL and the Development Office Cathy realized that she earned six Southwest Airlines tickets. Her charities of choice? The same ones at which she devoted her volunteer hours: SHSST and the Province Development Office.

Let us Recognize Your Special Occasion

The President of the United States sends a flag or a card for milestone celebrations such as a 50th wedding anniversary or special birthdays, the Priests of the Sacred Heart would also like to commemorate a special occasion for you or a loved one by sending a card or even a blessed Sacred Heart Statue.



Let us know about a wedding anniversary of 50 or more years, or a milestone birthday of 80 or more years. Simply send the following information at least six weeks in advance of the occasion to:

Priests of the Sacred Heart
PO Box 367
Hales Corners, WI 53130
Attn: Milestone Request

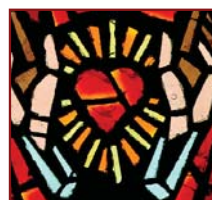
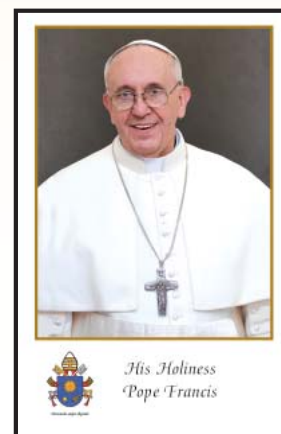
Please include:

- Name and home address of honoree(s)
- Exact date of occasion (month, day, year)
- Age (birthdays) or number of years of marriage
- Your (the requestor's) name and daytime phone number

Honoring Pope Francis' U.S. Visit

To commemorate the Pope's historic visit to the United States, the Priests of the Sacred Heart are offering a special edition prayer card featuring a photo of His Holiness and a prayer of service to those in need.

To request this special prayer card, please call us at 1-800-268-0157. Quantities are limited. All sacrificial offerings will help support our missions among the poor, a ministry close to the Pope's heart.



Extend your generosity beyond your lifetime.

Who are we?

When naming charitable beneficiaries in your plans, make certain that your attorney uses the correct legal name of the intended recipients in order to avoid confusion and unnecessary delays.

Our legal name is:
Priests of the Sacred Heart
Sacred Heart Monastery
P.O. Box 367
Hales Corners, WI 53130

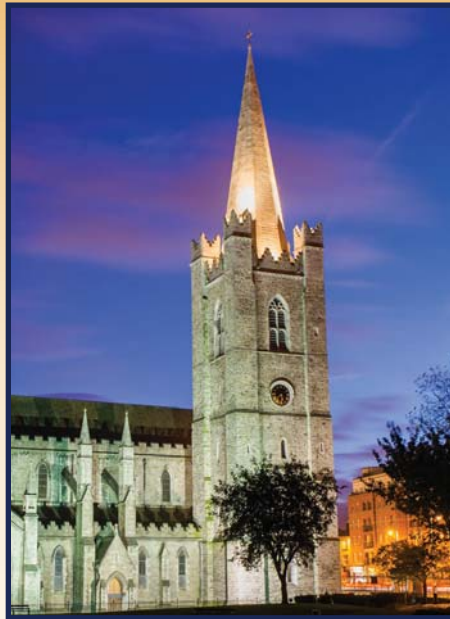
Pilgrimage to Ireland – September 2016

Join the Priests of the Sacred Heart on a journey of faith and fellowship to Ireland, the land of saints and scholars.

Our travels will take us to landmarks of the pre-Christian and early Christian eras, from the Rock of Cashel, to the holy mountain of Croagh Patrick, to the treasured Book of Kells, and more.

Enjoy spectacular scenery, opportunities to meet with the locals, and the comfort of deluxe accommodations – as part of this once-in-a-lifetime spiritual journey.

If you are interested in joining us, please contact Pam at 1-866-268-0157 or by email at pmilczarski@poshusa.org.



Events at Sacred Heart Monastery



Rev. James Schroeder, SCJ celebrated Mass for the Feast of the Sacred Heart on June 12, 2015. Fr. Jim and all of the SCJs were joined by 400 local and traveling friends of the Priests of the Sacred Heart.

Join us next year on June 3, 2016.



An annual healing Mass is held at Sacred Heart Monastery for friends who wish to receive the anointing of the sick.

Join us next year on May 17, 2016.

Paving the Way for Returning Seminarians

Earth movers, dump trucks and lots of piping are what greet visitors coming to Sacred Heart Seminary and School of Theology these days!

Dedicated in 1968, Sacred Heart Monastery is in need of upgrades and renovations.

This summer our focus has been on the exterior of Sacred Heart Seminary and School of Theology to improve accessibility for students and visitors alike. The front of the entrance is being reconfigured to allow for more parking near the front doors and better drainage. The outdoor renovation will also include new landscaping and better lighting.

Right now each gift we receive for the renovation will be tripled. Your \$50 donation will be matched threefold making your gift \$150!

Please consider a gift that will give life to Sacred Heart Monastery for another 50 years!



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Fall 2015

Published quarterly by the Mission Advancement Department, The Priests of the Sacred Heart.

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