



Thank you for considering St. Mary Parish in your estate planning. One sentence in your will can help the ministries of St. Mary Parish be there for your children and your grandchildren!

These documents contain general gift, estate and financial planning information for educational purposes. It does not provide legal or tax advice. For advice, or assistance on specific gifts and decisions, please consult an attorney or other professional advisor.

The Catholic Community Fund is the department at the Archdiocese of Boston that can answer all of your technical questions regarding wording for you particular situation. Though you do not have to inform the parish or the Archdiocese when you create your will there are special "legacy" programs for those people who wish to be known. If you would like to be included in these special benefits please let us know.

**Catholic Community Fund
We Can Help You.
Please call us to discuss how.**

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Five Ways

To support your Church, parish, school or other ministry through your will.

1 OUTRIGHT BEQUEST

a) Specific Dollar Amount

"I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole" [if the bequest is for other than the general use of the Roman Catholic Archbishop of Boston, a Corporation Sole, then add the following: "to be used for the benefit of <name and address of the parish, school or ministry>."]

b) Specific Property

"I give all my right, title and interest in and to <description of property> to the Roman Catholic Archbishop of Boston, a Corporation Sole" [if the bequest is for other than the general use of the Roman Catholic Archbishop of Boston, a Corporation Sole, then add the following: "to be used for the benefit of <name and address of the parish, school or ministry>."]

c) Share of, or Entire Residue, of Estate

"I give (all/or _____%) of the residue of my estate to the Roman Catholic Archbishop of Boston, a Corporation Sole," [if the bequest is for other than the general use of the Roman Catholic Archbishop of Boston, a Corporation Sole, then add the following: "to be used for the benefit of <name and address of the parish, school or ministry>."]

2 CONDITIONAL BEQUEST

Insert conditional language in the above provisions. For example:

"If my husband/wife does not survive me, I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole" [if the bequest is for other than the general use of the Roman Catholic Archbishop of Boston, a Corporation Sole, then add the following: "to be used for the benefit of <name and address of the parish, school or ministry>."]

3 RESTRICTIONS

If the gift is for a purpose other than an unrestricted use, insert the restriction in place of the words "to be used for the benefit of <name and address of the parish, school or ministry>." For example:

I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole, for the following use and purpose" [if the bequest is for other than the general use of the Roman Catholic Archbishop of Boston, a Corporation Sole, then add the following: "at <name and address of the parish, school or ministry>."]

4 FLEXIBILITY CLAUSE

Please add the following language to all bequests:

"If, in the judgment of the Roman Catholic Archbishop of Boston, a Corporation Sole (the "Archdiocese"), it becomes impossible to accomplish the purposes of this gift, the income and/or principal may be used for such related purposes and in such manner as determined in the sole discretion of the Archdiocese."

5 LANGUAGE FOR HAVING MASSES CELEBRATED

a) Specific Number of Masses at a Particular Church

"I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole, for the benefit of <name and address of the parish> for <specific number of> Masses to be celebrated over <number of> years after my death, for the repose of my soul <or other person or purpose>."

b) Annual Masses Over a period of Years

"I give the sum of \$_____ to the Roman Catholic Archbishop of Boston, a Corporation Sole, for the benefit of <name and address of the parish> for annual Masses over a period of <number of years not to exceed 25> years to be celebrated for <purpose>."

NOTE: If you want the parish to have access to all of the funds right away, also state: "It is not my intention to create a non-autonomous pious foundation or trust of any sort in canon law or civil law." Otherwise, the parish will not receive the principal amount until all of the requested Masses have been celebrated.

We advise you to review this language with your own legal counsel. This language is not provided as legal advice. Please discuss these issues with your own, independent legal counsel. We strongly urge you to review Language for Masses to be Celebrated with the Canonical Affairs Office of the Archdiocese of Boston.



For more information, please contact:

Catholic Community Fund

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25 Estate Documents

You Need To Put In One Place

The Essentials

- Will
- Letter of Instruction
- Trust Documents

Proof of Ownership

- Housing, Land and Cemetery Deeds
- Escrow Mortgage Accounts
- Proof of Loans Made and Debts Owed
- Vehicle Titles
- Stock Certificates, Savings Bonds and Brokerage Accounts
- Partnership and Corporate Operating Agreements
- Tax Returns

Health Care Confidential

- Personal and Family Medical History
- Durable Health Care Power of Attorney
- Authorization to Release Health Care Information
- Living Will
- Do Not Resuscitate (DNR) Order

Marriage and Divorce

- Marriage License
- Divorce Documents

Life Insurance and Retirement

- Life Insurance Policies
- Individual Retirement Accounts
- 401(k) and/or 403(b) Accounts
- Pension Documents
- Annuity Contracts

Bank Accounts

- List of Bank Accounts
- List of all User Names and Passwords
- List of Safe Deposit Boxes