My Response

I am pleased to inform you that DignityUSA’s Legacy Circle is included in our planned giving, and I/we wish to be members of the DignityUSA Legacy Circle.

If you are giving in the form of life insurance or will, please designate your gift to: Dignity, Inc., DBA DignityUSA. Our federal tax identification number is 52-1176940.

What is DignityUSA’s Legacy Circle?

Dignity members have generously donated to DignityUSA for over 40 years. These gifts fund DignityUSA in order for the Dignity community to continue its necessary work. But, what about after you pass on? It’s hard for people to think about what will happen after they die, but by doing so, it is possible for them to make plans to continue the work they have been involved in with DignityUSA. By remembering DignityUSA in your will or trust, you can leave a legacy reflecting your values and ideals that will benefit future generations of LGBT Catholics, continue your commitment to DignityUSA even after you are gone, and support a movement that has been a critical part of your life.

How Can I Continue to support DignityUSA’s Critical Work?

One of the simplest ways to donate is to give a gift of cash. You can do this by sending a check or contribute with a credit card at https://www.dignityusa.org/join. You can make a one-time gift or set up a monthly donation plan to help fund DignityUSA throughout the year.

Your gift of cash is fully deductible but generally cannot be more than 50% of your adjusted gross income (AGI). If you are generous enough to give more than 50%, that amount can usually be carried forward and deducted over five years.

Donating stocks may result in tax savings for you. If you donate stocks that are held for over 12 months and a day, you can take a charitable deduction for federal income tax purposes. The deduction is taken for the stocks’ fair market value on the date of the gift. This also allows you to avoid paying capital gains taxes on the appreciation of the stock.

If you have held stock for less than 12 months and a day, the amount of charitable deduction is different. The amount is your cost basis in the stock if that is less than the stock’s fair market value.

It is to your advantage if you give stock that you have owned for 12 months and a day because the tax advantages are greater.

If you give long-term held stocks, the charitable contribution deduction is generally deductible up to 30% of your AGI. Excess contributions can usually be carried forward up to five years.

You may want to consider giving a gift of real estate or personal property, such as art works or antiques. You will receive a tax deduction for the full fair market value of the real estate or personal property no matter what the original cost was, and you will not have to pay capital gains tax. You may also leave a percentage of your real estate to DignityUSA.

If you would like to use the real estate property during your lifetime, you can retain a life estate in the property so that DignityUSA does not take possession until your death. The amount of the charitable tax deduction will be determined by your age, the useful life of the property and other factors.

One of the simplest ways to give upon your death is a gift in your will or trust. Your bequest can be for a specific amount or a percentage of your estate. You can make DignityUSA a residuary beneficiary so that gifts to family and friends are paid first and DignityUSA gets the remainder of your estate after all other bills and bequests have been satisfied. If you do not have a will or a trust, inform your attorney about your desire to remember DignityUSA as a beneficiary. If you already have a will or a trust, you do not need to have the entire document redone. You can execute a codicil of a will or an amendment to the trust including DignityUSA as a beneficiary.

The planned gift is in the form of the indicated checked boxes below.

- ☐ GIFT of CASH
- ☐ GIFT of LIFE INSURANCE
- ☐ GIFT of STOCK
- ☐ GIFT of RETIREMENT PLANS
- ☐ GIFT of REAL ESTATE/PROPERTY
- ☐ GIFT of SPECIAL TRUSTS
- ☐ GIFT of BEQUESTS

Contact execdir@DignityUSA.org or call 800.877.8797 for additional information.
Please consult your attorney to ensure the proper paperwork for your estate is completed according to local law.

**Life Insurance**

You may use life insurance to benefit DignityUSA by designating DignityUSA both the owner and beneficiary of the policy. You would receive a tax deduction for the lesser of the cash surrender value of the policy or the total of your premium payments. The policy can be one you already own or a new one that you purchase.

**Retirement Plans**

You can name DignityUSA a beneficiary of your retirement plan, such as an IRA, 401(k) or other qualified plan. You may continue to withdraw funds during your lifetime or change beneficiaries.

**Special Trusts**

There are certain types of trusts that can give you income, allow you to receive a charitable contribution deduction and avoid capital gains taxes. They include charitable remainder unitrusts and charitable remainder annuity trusts.

A charitable lead trust is the opposite of the above trusts. The income is first paid to DignityUSA, then after a specified number of years, the assets are transferred to your heirs.

In order to determine which type of trust benefits you the most for tax purposes, you should consult with your attorney, accountant or financial advisor.

**Ensuring Our Work Goes On**

We encourage you to talk with us about your wish to support DignityUSA, and to discuss specific ideas or questions that you have.

Please contact our Executive Director at 800-877-8797 or execdir@dignityusa.org.

DignityUSA™
GAY, LESBIAN, BISEXUAL & TRANSGENDER CATHOLICS

**Legacy Circle**

“Dignity was the one Catholic organization where we were always welcomed without question. Future generations of LGBT people should have the same opportunity.”

**Vision Statement**

DignityUSA envisions and works for a time when Gay, Lesbian, Bisexual, Transgender, Queer and Intersex Catholics are affirmed and experience dignity through the integration of their spirituality with their sexuality, gender identity and gender expression, and as beloved persons of God participate fully in all aspects of life within the Church and Society.

**MAIL TO:**

DignityUSA
P.O. Box 376
Medford, MA 02155

**Thank You**

“I will be with you … always.”
Matthew 28:20