

Planned Giving News

Catholic Diocese of Rockford

September 2007



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From Greg Urban,
Diocesan Director of
Planned Giving



Welcome to the inaugural issue of the Diocese of Rockford Planned Giving Newsletter. I hope you enjoy it and learn the many ways you can promote planned gifts within your parish or institution.

Keep planting seeds!

Ministry Quicklinks
[Rockford Stewardship web](#)
[Catholic Foundation web](#)

Foundation Distribution of Earnings

If you have requested a withdrawal of earnings from your parish or school endowment account(s), you will soon be receiving your check(s). Two important questions come to mind: 1) Are you planning to report to your parishioners about how these funds will help the parish this year?; and 2) If you are planning to do so, how can you encourage parishioners to make gifts to your endowment(s) during the coming year or through their estate plan to help grow your corpus?

The following is a *sample* message that can be inserted in the bulletin in late September:

GOOD NEWS TO SHARE WITH YOU!

Recently we received a check in the amount of \$15,238 from the Catholic Foundation that represents the fiscal year earnings from our parish endowment account. We are **very grateful** for this annual distribution as it will help us achieve our goal of hiring a part-time youth minister [or whatever these funds are being used for this year].

For those of you who are interested in making a gift to our endowment, please contact the parish office or call Greg Urban at the Catholic Foundation and he can give you several options to consider, including a gift through your estate. He can be reached at 815-399-4300 ext. 358. Your gift to our parish endowment can never be spent, only the earnings each year can be withdrawn. It's the gift that never stops giving! Thank you for prayerfully considering this request.

This is just one simple way to let people know about your endowment accounts. I would also encourage those who feel comfortable doing so, to give the same or similar message in the announcements at all the Masses on a particular weekend.

Worth Mentioning Again

We have compiled a [10-year return history](#) of the Foundation showing what each fund (Growth, Balanced, and Income) gained or lost each year over this time period (click on the link above). You might find this interesting and useful in sharing with your parish leadership. Just so you are aware, your Catholic Foundation website can be found at www.FoundationRockford.org.

Thank you to those who have contacted me about conducting a *Wills Seminar* at their parish this fall. If you would like to conduct a seminar before the end of the year and have not yet contacted me, please do so as soon as possible. I'm here **to help your parish or institution** meet its long-term goals through planned gifts!

Bulletin Blurbs

A guarantee for life! That is what you get by making a gift in exchange for a Charitable Gift Annuity (CGA). You are guaranteed a certain income for the rest of your life no matter how long you live or what interest rates are. Your gift gives twice. First to you in income and possible tax deductions and then to the parish at the end of your life. By endowing your gift it will keep on giving forever.

Promoting Planned Gifts at Your Parish

I cannot stress enough the importance of promoting planned gifts at your parish throughout the year on a regular basis. The Office of Planned Giving has developed a month-by-month list of suggestions on how you might go about doing this. Follow this link: [Parish Planned Giving Yearly Activities](#).

Why am I receiving this newsletter?

You are receiving this newsletter because I thought you might be interested in its content. I hope to keep in contact with you on a regular basis, hopefully monthly, in an effort to keep planned giving on your mind. Encouraging planned gifts to benefit your parish or school is everyone's responsibility. If you do not wish to receive future newsletters, you can opt-out following the instructions at the bottom of this letter. You may also choose to forward this e-mail to others who you think may be interested in this topic.

"All temporal and spiritual goods are created by and come from God... One day God will require an accounting of the use each person has made of the particular portion of these goods entrusted to him or her." US Bishops' Pastoral Letter: Stewardship -- A Disciple's Response, p. 20

Contact Info

Deacon Gregory S. Urban
Director of Planned Giving
Office of Stewardship Development
Ph: 815-399-4300 x358

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