



# Basilica of the Co-Cathedral of the Sacred Heart

## RENEWING OUR PRESENT SECURING OUR FUTURE

**CAMPAIGN GOAL - \$3,000,000 OVER 3 YEARS**

<b>1,000,000</b> <b>ENDOWMENT FOR SCHOOL</b>	<b>1,000,000</b> <b>ENDOWMENT FOR PARISH</b>	<b>1,000,000</b> <b>PARISH NEEDS AND OBLIGATIONS</b>
An endowment will be created to ensure the viability of Sacred Heart Grade School.	An endowment will be created to ensure the viability of Sacred Heart Co-Cathedral.	MAINTENANCE AND SECURITY ENHANCEMENTS NEW MAUSOLEUM PARISH OBLIGATIONS

### GIVING OPTIONS



#### **CASH OR CHECK**

Checks should be made payable to **Sacred Heart Campaign (CSA on memo line)**. Although not preferred, cash is accepted.



#### **CREDIT CARD / ACH DEBIT - ONLINE GIVING**

If you wish to make your gift via credit card, debit/ACH or automatic draft, please visit **sacredheartcathedral.com**. Visa, Mastercard, Discover and American Express are accepted.



#### **EMPLOYER MATCHING GIFT**

Your employer may have a matching gift program that will double your gift at no extra cost to you. Check with your (or your spouse's) Human Resources Department to see if your employer offers a matching gift program.



#### **TAX-SMART STRATEGIES\***

- Gifts of Appreciated Securities / Stocks
- Donor-Advised Fund (DAF)
- Qualified Charitable Distribution (QCD)
- Life Insurance

*\*Full descriptions on back*

*Our campaign is operated and conducted by the Catholic Sharing Appeal of the Diocese of Wheeling-Charleston. Endowment funds will be managed by professionals of the West Virginia Catholic Foundation.*

## **TAX-SMART STRATEGIES\*\***

### **GIFTS OF APPRECIATED SECURITIES / STOCKS**

Gifts of appreciated securities (those held for more than one year), such as stocks, bonds, exchange-traded funds (ETFs), and mutual funds are accepted. Gifts of appreciated stocks may be deducted at full market value. Save on capital gains taxes while providing a contribution to us. Stocks must be transferred to us before being sold to receive tax benefits. Please visit the website for complete transfer instructions.

### **DONOR-ADVISED FUND (DAF)**

A donor-advised fund is a philanthropic giving vehicle that allows individuals to donate assets for your parish, school or Diocese today, and receive a tax deduction now, while maintaining discretion about when the assets will be granted to charity. It's easy to make a gift through a DAF. You make a gift of cash or other assets to your DAF (you may get a potential tax deduction at the time of your gift). Then, you simply recommend a grant to support the campaign.

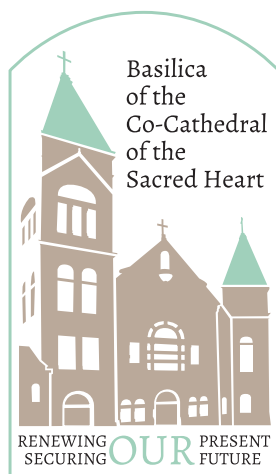
### **QUALIFIED CHARITABLE DISTRIBUTION (QCD)**

A QCD, also known as an "IRA Charitable Rollover Gift" is money that you can transfer directly from your traditional IRA account to any 501(c)3 charity. This is one of the most tax efficient ways for donors aged 70.5 and older to make charitable gifts, because making a QCD lowers a donor's taxable income. And, if you are 72 or older, you don't need the money from your IRA just yet, and you don't want to pay more in taxes, donating your RMD (Required Minimum Distribution) is a great option.

### **LIFE INSURANCE**

Charitable donations of a life insurance policy can be an excellent way to support the parish and school, both while you are living and after you've passed away. You can donate your policy to a charity, name a charity beneficiary while retaining ownership of your policy, or use any policy dividends as regular gifts.

*\*\*Because each situation is unique, we urge you to discuss such donations with a financial adviser.*



#### **CONTACT:**

Basilica of the Co-Cathedral of the Sacred Heart

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Website: [sacredheartcocathedral.com](http://sacredheartcocathedral.com)

#### **LEADERSHIP TEAM**

Very Rev. Donald X. Higgs

Kirsten Mork

Cindy McGhee

Pat Graney