



**The Catholic Foundation
of Central Florida**

Inspire Giving. Fund God's Work.

Wills & Estate Planning

*Key Estate Planning Documents
Every Catholic American Needs
to Have*

Presented by:

- Alyson C. Kendust, Esq.
Attorney at Law
- Charlie Van Patten, JD
Director of Philanthropy, CFOCF



Legacy Planning Seminar Series



Hosted by

ST. JOSEPH PALM BAY
CATHOLIC CHURCH



Legacy Planning Seminar Series



The Catholic Foundation
of Central Florida

Welcome

Thank you to our partner

ST. JOSEPH  PALM BAY
CATHOLIC CHURCH





The Catholic Foundation of Central Florida

*“The Catholic Foundation of Central Florida is our **best steward of investment** and management of the generosity of the many people who participate in the life of this local Church. My hope is that all parishes, missions and schools utilize the breadth of resources and knowledge through **The Catholic Foundation of Central Florida** for any development effort of the Diocese of Orlando. Since my appointment as Bishop of Orlando, I am impressed with its capabilities and rejoice that through the ministry of The Catholic Foundation of Central Florida we are able to fulfill our financial needs.”*

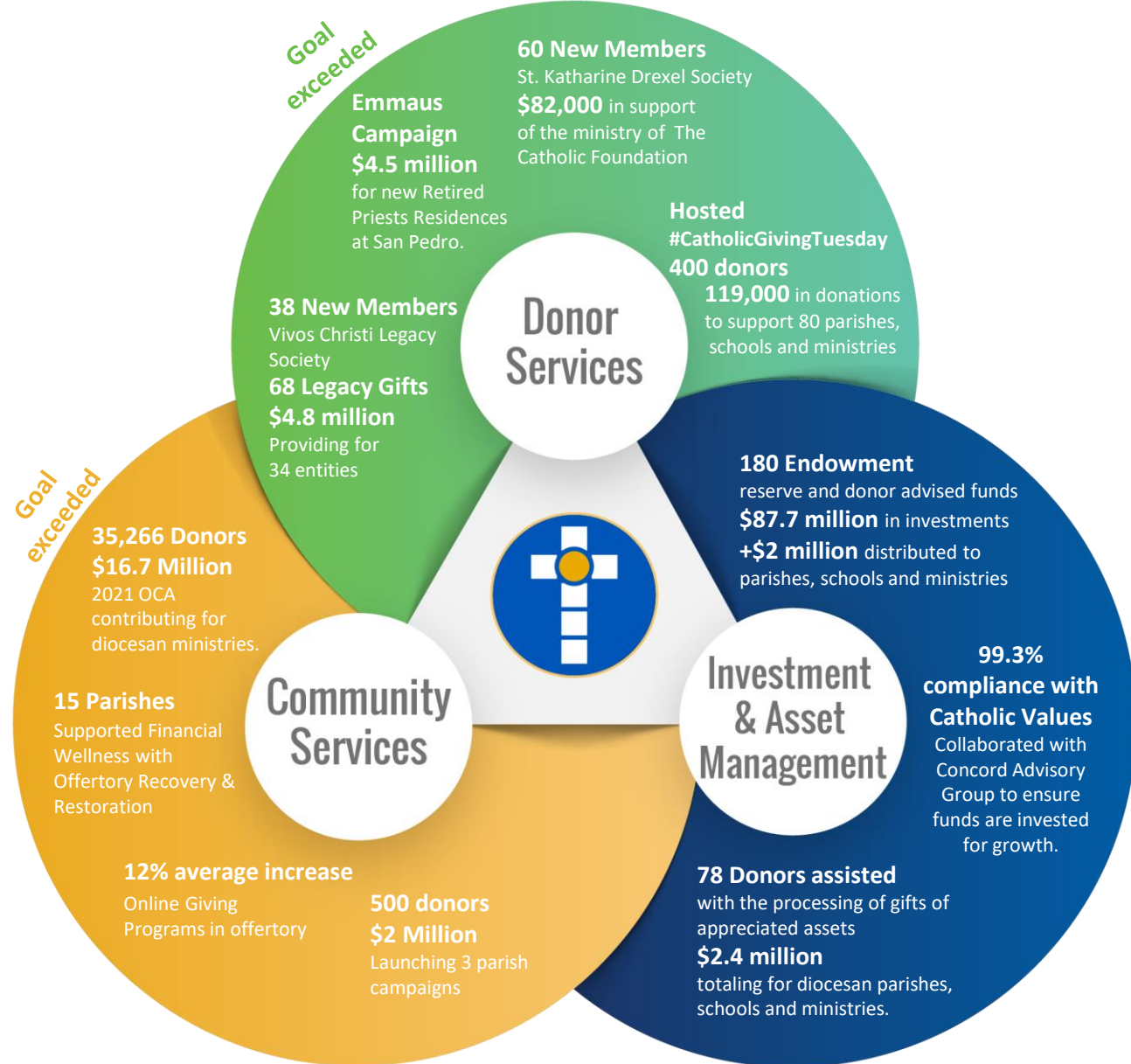
Most Reverend John Noonan
Bishop of Orlando



How We Serve

The Catholic Foundation of Central Florida’s Mission is to inspire and increase giving, to prudently invest the resources entrusted to us, and to capably steward those charitable gifts to support the spiritual and corporal needs of the community of the Diocese of Orlando.

In 2021 our core services inspired and increased giving providing a great impact on ministries throughout Central Florida.



As a proven trustworthy philanthropic organization to give to and give through, The Catholic Foundation of Central Florida has received the GuideStar Platinum Seal of Transparency.

Data Management + Communications + Advancement Services + Administration



Alyson C. Kendust, Esq.

- Alyson C. Kendust is an attorney in the Corporate, Business and Tax Department at Lowndes. She primarily focuses her practice on sophisticated estate planning and complex estate and trust administration.
- Alyson earned her undergraduate degree in Political Science from the University of Florida – Hume Honors College and her law degree, with a Certificate in Intellectual Property, from the Catholic University of America Columbus School of Law. While in law school, she was recognized with Book Awards in both Advanced Trial Practice and Agency & Partnership.
- A Melbourne native, Alyson is active within the local community where she serves as a member of both the Brevard Zoo's Planned Giving Committee and the Melbourne Central Catholic High School's Advisory Council. She also volunteers with Brevard Family Partnership and Friends of Children of Brevard County and as a member of 321 Millennials, an organization that is focused on building the community and economy within Florida's Space Coast.

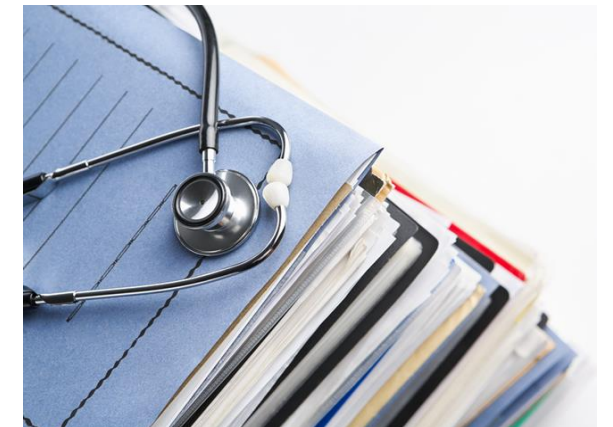
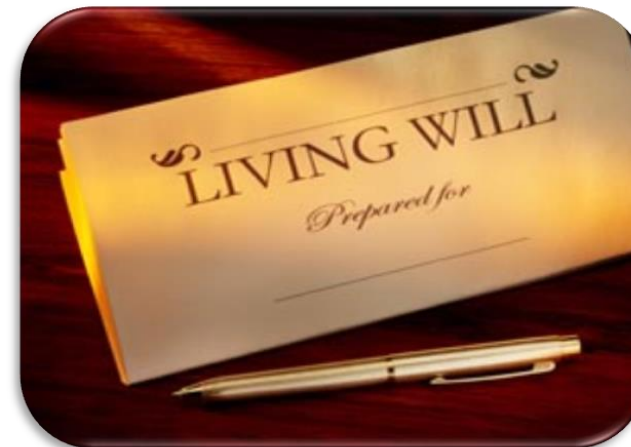


Alyson C. Kendust, Esq.
Trust & Estates
Associate - Lowndes

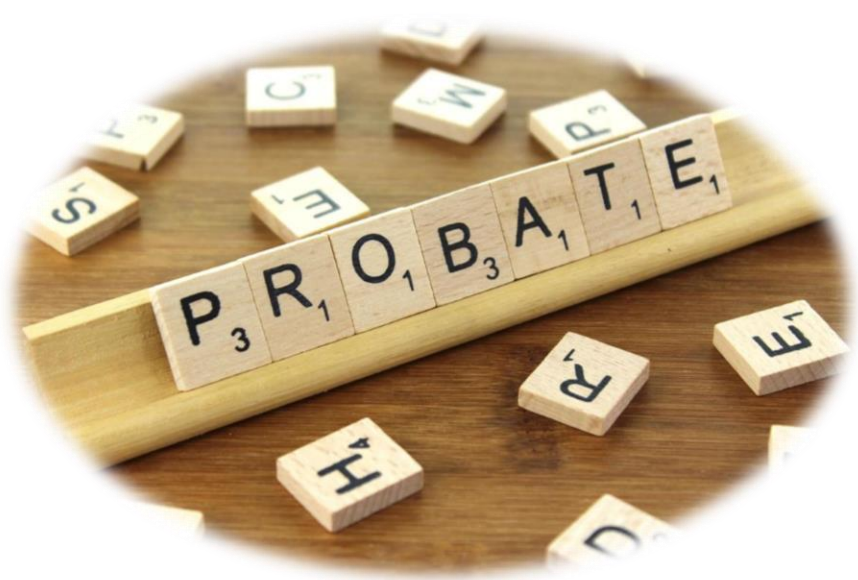


Lifetime Documents

- Durable Powers of Attorney
- Health Care Surrogate Designation
- Living Will
- Preneed Guardian Designation



Probate versus Intestacy



- What is Probate?
 - What assets flow through Probate?
 - What assets are exempt from Probate?
 - How to avoid probate – titling of assets/trust

- What is intestacy?
 - Ramifications of dying without a valid Will in the State of Florida



Post-Mortem Documents & Considerations

- Last Will and Testament – Directs disposition but Probate likely
 - Comprehensive Will
 - Pour-Over Will
 - Cremation/Burial Instructions
 - Personal Representative – Who can qualify?
- Revocable Trust – Probate Avoidance, No Creditor Protection in Florida
 - Individual
 - Joint with Spouse
 - Assets to Title in name of the Trust
 - Trustees – Who can qualify?
 - What types of assets can a trust hold?
- Takers of Last Resort and Charitable Planning



Estate Planning – Other Considerations

- Timing – revisiting plans every 5-7 years, or whenever a major life event occurs (i.e. marriage, death, divorce, college graduation of child, etc.)
- Distributions to Minors or Beneficiaries with Special Needs



- Irrevocable Trusts
 - When are these appropriate?
 - Current Estate and Gift Tax Exemption - \$12.92M per individual in 2023
 - Portability
 - Marital Deduction
 - Lifetime Gifting Strategies





Questions



Passing Your Values Along to Future Generations

Your life is the legacy that you are already creating.

It's who you are.

What you stand for.

Where you came from.

How you've lived your life.

Your beliefs. Your values. Your story.

Would you like those things
to continue to have
meaning to your
loved ones?



Establish



Grow

Impact

***Don't delay. Engage your family. Tell Your Story.
Have the conversation.***



CFOCF Legacy Resources

- **Planning Your Catholic Legacy – A Wills Guide**
- **Create a Family Mission Statement**
- Opportunities to Leave Your Legacy of Faith
- Create Your Catholic Legacy Video
- Catholic Legacy Letter/Journal



CFOCF
Planned Giving Advisory Council
www.cfocf.org/advisory-council



www.cfocf.org/legacy





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Create a Family Mission Statement



Questions for Reflection

- What inspires you?
- Why is your faith important to you?
- What values are important to you?
- How has your family impacted your community through charity?
- How do you want to make an impact in the future?
- Who/what are you already giving to?
- How are you transitioning your values to your children and grandchildren?



Family Research on Storytelling

- Shared sense of purpose and values help families come together
- It establishes ideals to strive for in the future
- Assists when making choices
 - Individually
 - As a Family
- Assists parents with decision making



Where to Begin?



Call a Family Meeting



Identify Your Family's Core Values

Authenticity
Achievement
Adventure
Authority
Authentic
Autonomy
Balance
Beauty
Belief
Boldness
Caring
Catholic
Community
Compassion
Courteous
Challenge
Citizenship
Cleanliness
Committed
Community
Competency
Confident
Contribution
Courageous
Creativity
Curiosity

Determination
Dignity
Diligence
Discipline
Dream
Dutiful
Empathy
Ethical
Excellence
Fairness
Faith
Fame
Family
Forgiving
Friendship
Fun
Generous
Gentleness
Giving
Gracious
Goodness
Gratitude
Growth
Happiness
Helpful
Honesty

Hopeful
Humble
Humor
Imagination
Influence
Inner Harmony
Integrity
Innovation
Intellectual
Joyful
Justice
Kindness
Knowledge
Leadership
Learning
Life
Long-suffering
Love
Loyalty
Meaningful Work
Merciful
Mildness
Moral
Obedient
Openness
Optimism

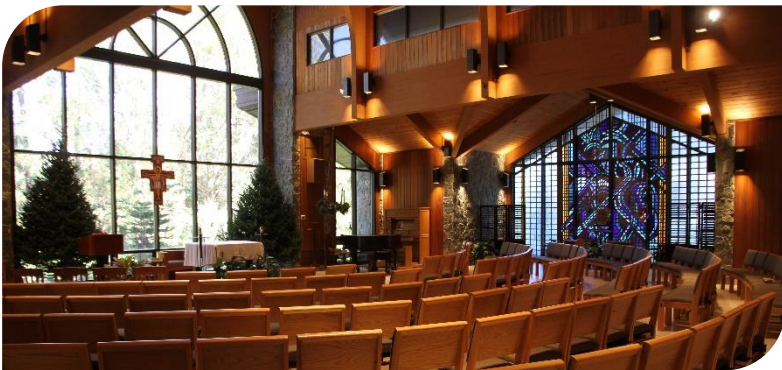
Patience
Peace
Perseverance
Pleasure
Poise
Popularity
Purposeful
Recognition
Religion
Reputation
Resilience
Respect
Responsibility
Security
Self-control
Self-Respect
Service
Solidarity
Spirituality
Stability
Strong
Success
Status
Teachable
Tenacity
Tenderhearted

Thoughtful
Tolerant
Trustworthiness
Truthful
Wealth
Wisdom
Work Ethic



Family Mission Statement

“The mission of our family is to create a nurturing place of faith, love and service. We show respect for one another and ourselves. To return the blessings our family received from the San Pedro Retreat Center, we will provide scholarships for children to attend the summer camp retreats.”



“We are a family that loves and looks out for one another and our neighbors. We commit to always be there for each other. We know we have been abundantly blessed and will volunteer and contribute as a family to help our brothers and sisters in Christ who are in need.”



“We pray everyday, tell the truth, practice forgiveness and choose to live with joy in our heart. To honor our loved one who has Down syndrome and who God created perfect, we support ministries that empower people with disabilities including Morning Star School and Bishop Grady Villas.”

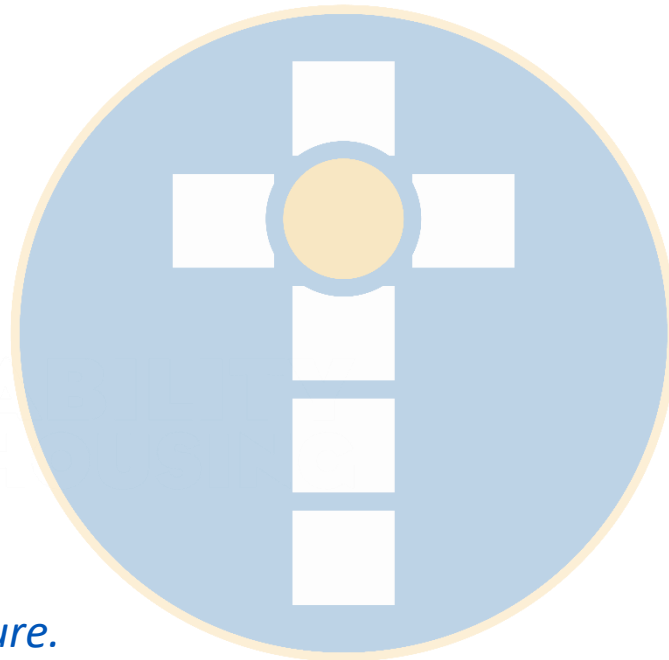


Family Giving Mission Statement

In this family...

we are real,
we make mistakes,
we say: "I'm sorry."
We believe in God and in each other.

We have fun,
we love each other,
we give hugs, we forgive.
We are generous to our family and to others with our time, talent and treasure.



In our family...

we are strong and courageous – *1 Corinthians 16:13*
we trust in God's plan – *Jeremiah 29:11*
we let our light shine – *Matthew 5:16*
we pray for one another – *James 5:16*
we are joyful in life – *Ecclesiastes 8:15*

We trust in the Lord with all our hearts

Proverbs 3:5 – 6

We believe all things are possible with God

Matthew 19:26



Consider a Tagline

A tagline could also be considered a motto.

It's one sentence that encapsulates your family culture.

Examples:

*"Our family is built on faith, hope, and love."
1 Corinthians 13*

*"Always do your best, and your best is always
good enough!"*



Legacy Planning – Family and Beyond

- After you remember your family in your legacy plans, consider your legacy to your spiritual family.
- Your parish, school, or ministries.
- Engage your family and an expert team including a financial planner, estate attorney, and other professionals.
- Join the Vivos Christi Society.
- We are here to help you achieve your philanthropic goals!



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VIVOS CHRISTI SOCIETY



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Join us for our next Legacy Planning Session
*Financial Planning: Protecting Your Family and Planning Today for a
Better Tomorrow*

Wednesday, February 8 at 9:30AM

www.cfocf.org/leavealegacy



Thank You



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