

Discuss your values and goals with your loved ones so that they know your plans and have a full appreciation for your decisions.




of your will. Choose someone who will be comfortable dealing with your finances and investments, taxes and record keeping. Also consider this person's availability, general health and diplomacy.

- **Guardian.** If you have minor children, name a guardian of each child in case your spouse doesn't qualify or does not survive you.
- **Agent for your durable power of attorney for finances.** Choose someone to act on your behalf in financial matters if you become unable to manage your own affairs.
- **Agent for your durable power of attorney for health care.** This person makes health care decisions on your behalf if you are unable to make them.
- **Estate planning attorney.** This person ensures that your wishes are accurately and clearly communicated through your will and legal documents.

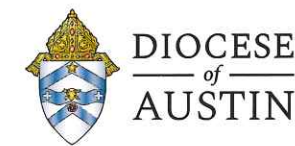
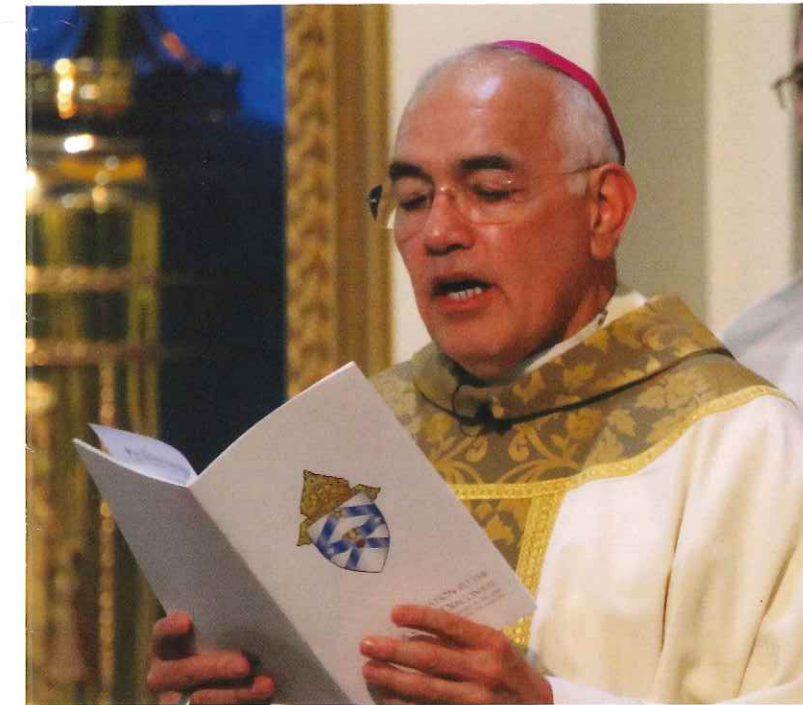
4 Step 4: Extend your legacy. Your estate plan offers an incredible charitable opportunity. You can designate our

organization as the recipient of a percentage of an item or your estate. There are tax advantages for many of the gifts and the action extends your caring nature beyond your lifetime. If you're considering remembering our organization in your will or through your estate plan, we'd be happy to meet with you to help answer any questions you may have, with no obligation.

5 Step 5: Share the good news. Ensure that any recipient of your generosity knows of your plans. This will ensure that they are aware of your intentions and will relieve undue stress in the future.

 **Congratulations!** You have taken the time to ensure that your family and favorite causes are cared for far into the future. Continually review your estate plan whenever major life changes or tax law changes occur, to make sure it's still the best plan for you and your family.


5 Steps to Protect Your Family and Your Assets



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Make a Plan That Reflects What Matters to You

Simple Steps, Big Impact

If you've put off writing your will or making plans for how your estate will be distributed after you're gone, you're not alone. Let's face it, estate planning can seem like a chore. But—like paying the bills or cleaning the house—it's a task that, once completed, feels great.

Getting started is often the hardest part, so we've put together a simple plan to help. If you keep at it, in just five steps you will have the peace of mind that comes from building a solid plan that protects you and your loved ones.

1 Step 1: Tally your assets.

The first step in creating your estate plan is taking inventory of personal data. You should include the following:

1. A list of your assets that shows current value as well as title (whether held in your name, jointly or, in certain states, as community property).
2. If you are married, a list of your spouse's assets.
3. Specifics about any debts and other liabilities.
4. A list of life insurance policies that indicates the insured, the owner and the beneficiary of each.
5. Names of your beneficiaries, including relatives and charitable organizations.
6. The location of your will, securities and other valuable papers.

2 Step 2: Make decisions about your estate plan.

Your estate plan provides a complete picture of your values and for the people and charitable causes that are important in your life. An up-to-date will serves as the foundation of your plan; asset titling and coordinating your beneficiary designations for assets such as retirement plan accounts and life insurance policies are also important.

In this step, you will list each person and nonprofit you'd like to benefit. Then you'll review your will, asset titles and beneficiary designations to determine if they mesh with your current goals.

For each recipient, include the gift or percentage you'd like each to receive. (To put a gift in your will or change the title of an asset, you may need to work with an attorney to formalize your wishes.)

3 Step 3: Pick your team.

Think about and list whom you'd like to fill these roles:

- **Executor or personal representative.** This is the person you name to carry out the terms



The simple truth:

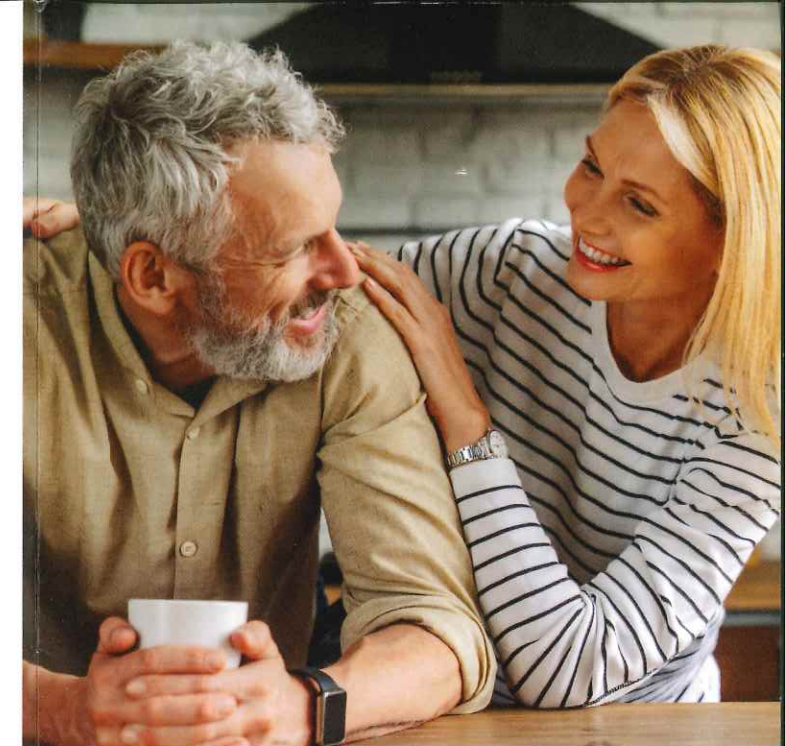
Estate planning is for everyone. It's your opportunity to express your values and effectively provide for the people and causes you cherish most.



Are You on Step 2?

Contact us to learn how you can support our mission with a gift in your long-term plans.

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The Duties of Your Executor or Personal Representative

This list can help you pick the right person for this important role. They will:

- Locate the will.
- Hire a probate lawyer, if necessary.
- Notify beneficiaries named in the will.
- Inventory all assets and have them appraised, if necessary.
- Collect all debts owed to the estate.
- Pay valid claims against the estate.
- Distribute remaining assets to your named beneficiaries.



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Change is powered by people. People like you.

You've regularly shown a deep commitment to meeting the diverse needs of the Diocese of Austin and its parishes. Thank you. That's why I'm sending you these stories about the power you have to create change in the years ahead. I hope you find a takeaway or two.

I also hope you'll take a moment to reflect on how your experiences as a member of a vibrant, living Church have shaped your life—and how the Diocese of Austin fits into your legacy.

In this issue of *Creating Your Legacy*, you'll meet Kristina Arce who is giving back to us through her estate plan. Kristina is extending the blessings she has received in her life to others in need. She's also ensuring that what she values lasts—you can, too.

And don't miss our special gift to you.

Like many things, taking the first step is the hardest part. We want to help. Our FREE guide ***5 Steps to Protect Your Family and Your Assets*** breaks down the estate planning process and brings you peace of mind.

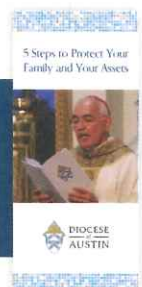
Simply return the enclosed reply form to request yours FREE today!

Together we can change the future for our parishes, schools and grow our ministries. If you have any questions about extending the gifts you've been given, please contact me.

Sincerely,

Scott Whitaker
Executive Director
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P.S. Thank you for your loyal support of the Diocese of Austin. I'd like to send you a FREE guide that lays out the assets you need to account for and the people you need on your team. Get ***5 Steps to Protect Your Family and Your Assets*** today by returning the enclosed reply form.





Creating Your Legacy

Santa Rosa de Lima Parish Member Passes on the Lord's Blessings Through Charitable Giving

With more women in leadership in their workplaces and communities, Kristina Arce believes they need to reflect that leadership in their actions, especially in terms of their charitable giving.

In regard to her own career as a financial controller and the advancement opportunities she has received, the member of Santa Rosa de Lima Parish in Andice gives credit where credit is due. "I've held to the belief that it's not me, it's coming from the Lord," she says. "I need to give back all of the blessings that have been bestowed upon me."

Through her will, Kristina has ensured this giving will not end with her lifetime. When she wrote her will, she included her parish, the Diocese of Austin's Catholic Services Appeal (CSA) and other charities and organizations she feels compelled to support.

Kristina also wants her son to see the importance of giving back, "to have that charitable mindset," she says.

Kristina began tithing at age 16 as a waitress, and soon realized that what she gave almost always came back to her in some way—at first, with more tips and then, later in life, with raises and promotions. She uses these "rewards" to increase her giving to others.

It was during Bible study years ago that Kristina learned the true reward of stewarding God's blessings in her life. "Doing good deeds doesn't necessarily make you a Christian," she says, "but being a Christian drives you to do good deeds."



Kristina Arce and family, Easter 2022

You can give back with the same blessed intention and impact as Kristina. Please contact Scott Whitaker at (512) 949-2441 or scott-whitaker@austindiocese.org or Dan Wierzbowski at (512) 949-2496 or dan-wierzbowski@austindiocese.org to find out more about ways to include the Diocese of Austin in your estate plan.

THE IMPORTANCE OF PLANNED GIVING

Why Your Future Gifts Matter

At the Diocese of Austin, we rely on donations from friends like you to continue providing sustained and socially responsible support to our Catholic ministries, now and in the future.

But what about the future? Though we've accomplished a lot, there's still much left for us to do. Planned gifts help us get there.

When you make a planned gift to the Diocese of Austin, you:

- Provide us with solid financial footing
- Help us plan for the future with confidence
- Ensure we can adjust our offerings to meet the changing needs of our parishioners

There are several ways you can make a planned gift to the Diocese of Austin, many of which offer you benefits in return. Some popular gifts include:

- » **Giving a gift in your will or living trust.** This gift costs you nothing today and is easy to change as needed.

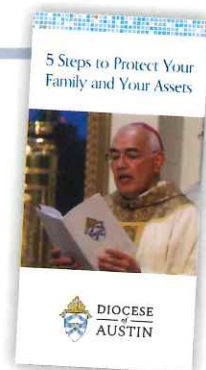
- » **Naming the Diocese of Austin as a beneficiary of your retirement plan assets.** A simple form is all that's needed to make this gift.
- » **Donating appreciated stock.** When you give stock that is worth more now than when you bought it, you can avoid capital gains tax.
- » **Establishing a life income gift.** Give a gift and receive steady income in return. You may even qualify for a tax deduction in the year you make your gift.

Find Your Gift

A planned gift is more than just another way to give. It's a way to help create the future you want to see by ensuring your support for our work continues even after your lifetime. Contact Scott Whitaker or Dan Wierzbowski to learn more.

Protect What Matters Most

If you've put off writing your will or solidifying your plans, you're not alone. Getting started is often the hardest part, so we want to share a simple plan in our new guide **5 Steps to Protect Your Family and Your Assets** to help you begin right now. Return the enclosed reply form today to get yours FREE.




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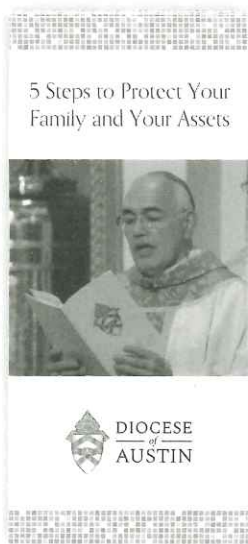
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Yes, Help Me Strengthen My Plan!

Please complete and return this reply form in the enclosed envelope today.



- I would like a FREE copy of *5 Steps to Protect Your Family and Your Assets* so that I can create a secure future.
- I've already chosen to extend the blessings I've been given by including a gift to a Catholic organization in the Diocese of Austin in my estate plan. Please send me the benefits of being welcomed into the Perpetual Light Society.

Thank you for your care for the ministries and parishes we support!

Name—Please print

Telephone

Email

Address

City, State ZIP