



Legacy Planning

What would you like your gift to do—*for you?*

A successful gift that will benefit you and St. Patrick's Seminary starts with careful planning.

Planned giving is a strategic approach that aligns St. Patrick's Seminary's current needs and long-term goals with your financial, tax, and estate planning objectives—and results in a gift that significantly benefits St. Patrick's Seminary and that provides you with tax savings and preserves your estate. A win-win.

Ready to start planning your gift? Use the chart on the following page as a starting point for your planned giving journey. It's a handy tool for aligning your goals with the various gift options that support our mission of priestly formation. Then consult with your attorney or financial advisor to select the right option for you and your family.

No matter your need, there is a planned gift option to help you achieve your goals. We're here to assist you and your advisors in finding the best way to create your charitable legacy while meeting your goals.

For more information about planning your gift to St. Patrick's Seminary, please reach out to us at (650)289-3355 or email Director of Advancement, Martha Sheridan: martha.sheridan@stpsu.edu.

START YOUR GIFT PLANNING HERE

If Your Goal Is To:	Your Best Option Is To:	Your Potential:
Support our future without affecting your cash flow or portfolio.	Name St. Patrick's Seminary as a beneficiary in your will or living trust.	Retain control of your assets during your lifetime and receive an estate tax charitable deduction
Avoid double taxation on IRAS or other retirement plans while supporting our mission.	Name St. Patrick's Seminary as a beneficiary of your retirement plan; save taxes and leave other assets to family.	Eliminate income and estate taxes on your retirement plan; free up other assets to pass to your heirs.
Utilize an overlooked asset to provide substantial support to St. Patrick's Seminary.	Donate a life insurance policy you no longer need or name us as the beneficiary on an existing policy.	Increase your ability to support us without affecting your lifestyle.
Make the simplest, current donation	By check, debit, or credit card at www.stpsu.edu/giving	Receive an income tax charitable deduction and make an immediate impact at St. Patrick's Seminary
Leverage more generous support to St. Patrick's Seminary— and avoid capital gains liability	Donate appreciated stock, and bonds or mutual funds held longer than one year	Buy low and give high tax-wise support that provides capital gains tax advantage and an income tax charitable deduction
Use collectibles to support the mission of St. Patrick's Seminary & University	Donate a collection related to our charitable mission	Receive an income tax charitable deduction for the value of the gift and avoid tax on any gains
Tap one of the most valuable assets in your portfolio to support St. Patrick's Seminary	Donate real estate	Avoid capital gains tax, receive an income tax charitable deduction, and remove a large asset from your taxable estate
Continue to use your home or vacation home while also using it for a charitable gift	Gift subject to a retained life estate	Continue lifetime use of the property, current income tax charitable deduction, removal of the property from your estate, so your heirs do not have to sell it