



The Nativity Preservation Legacy Fund

Your Legacy, Our Future



Legacy Fund

Planned giving involves a donor's intention to contribute a gift during or beyond their lifetime as part of financial or estate planning. These commitments better help Nativity BVM High School fulfill our mission. Our community of supporters continue to embrace the power of planned giving, and the forward-thinking members of our The Nativity Preservation Legacy Fund are a source of hope for all those within our community that we impact. Giving options may include:

Bequests

HOW

Name Nativity BVM High School as a beneficiary in your will or living trust. Designate a specific amount, percentage or share of the residue.

GOAL

Defer a gift until after your lifetime.

BENEFITS

Control your assets for your lifetime.
Donation is exempt from federal estate tax.

Charitable Gift Annuity

HOW

Establish a charitable gift annuity contract that pays a set amount for life.

GOAL

Supplement income with steady, partially income-tax free payments.

BENEFITS

Current and future savings on income taxes plus fixed payments for life for one or two individuals.

Appreciated Assets

HOW

Contribute long term appreciated stock or other securities.

GOAL

Eliminate tax on long-term capital gains.

BENEFITS

Immediate charitable deduction.
Elimination of long-term capital gains tax.

Real Estate

HOW

Gifts of property are often some of the most creative and beneficial planned gifts.

GOAL

Make a gift of property while getting an income tax deduction.

BENEFITS

Immediate income tax deduction with reduction or elimination of long-term capital gains tax.

Retirement Assets

HOW

Name Nativity BVM High School as the beneficiary of your retirement account after your lifetime.

GOAL

Avoid the twofold taxation on IRAs or other retirement plans.

BENEFITS

Make a gift from the most highly taxed assets, leaving better assets for your family.

Life Insurance

HOW

Change ownership on a policy you no longer need.

GOAL

Make a large gift with little cost to yourself

BENEFITS

Current income tax deduction and possible future deductions through gifts to pay future premiums.

What To Do Next

Preserving Nativity's Legacy

As the primary secondary Catholic educational option in the area, Nativity BVM exemplifies the essentials of academic excellence and affirms the traditional life values of Christianity in Catholic faith. Our students graduate and go on to make a difference in our community and the world. The faith journeys that have been shared and the paths yet to be taken are only possible because of the solid foundation laid by faithful donors like you. The impact of a legacy gift is endless - it promotes strong community values, provides tax benefits, and ensures that the causes meaningful to you are provided for.

- ✓ Consider how you would like to be remembered through your legacy.
- ✓ Would you like to receive a name dedication? Our team can run through our donor recognition options with you.
- ✓ What is important to you in your life and how will your estate planning reflect your interests and values?
- ✓ Contact your financial advisor or lawyer to start preparing your Will or to add a simple amendment. Professional advice will also help you maximize the tax advantages of your gift.
- ✓ Place serious consideration into having a Will written long before the time may come to do so.
- ✓ Take control of your finances to ensure that your wishes are met upon your passing.



Questions?

Contact our Development Office who will be happy to answer your queries and refer you to one of our trusted financial partners. If you feel comfortable sharing your news, let the school know that you have included a gift in your Will by filling out the Legacy Giving Notification form or by contacting Jennifer Daubert, Development Office, at 570.622.8110 or jlдаubert@nativitybvm.net.

The Impact of Legacy Giving

In the past, one generous donor's contribution to Nativity through planned giving had a profound impact on the future of our school. By choosing to support Nativity through planned giving, this donor showed immense dedication to the school's mission and the success of our students. Their thoughtful gift not only helped to secure the school's financial stability at the time but also provided opportunities for growth and innovation. Thanks to their generosity, Nativity was able to implement new programs, improve facilities, and offer scholarships to deserving students. The ripple effect of their donation was felt for years, ensuring that Nativity continued to thrive and make a difference in the lives of many. It is from this donation that the name The Nativity Preservation Legacy Fund came to be. It is our hope that others join with the same intention of this individual...to ensure the legacy of Nativity for generations to come!

The Nativity Preservation Legacy Fund

Planned gifts have and will continue to play a significant role in supporting the long-term sustainability and growth of a Nativity BVM High School. They will live on for generations, impacting countless lives and ensuring that Nativity's mission can thrive.

- ✓ **Financial Stability:** Planned gifts provide a stable source of funding for the school, ensuring that Nativity can continue to offer quality education and resources to students. These gifts help bridge the gap between tuition revenue and the actual cost of education, provide for faculty and staff development and retention, updates to campus facilities and more.
- ✓ **Legacy Building:** Donors who make planned gifts have the opportunity to leave a lasting legacy at the school. By including Nativity in their estate plans, donors can make a meaningful impact that will benefit future generations.
- ✓ **Encouraging Philanthropy:** Through the The Nativity Preservation Legacy Fund Nativity can continue to cultivate a culture of philanthropy. Encouraging individuals to consider including the school in their estate plans can create a sense of giving back and supporting a cause they are passionate about.
- ✓ **Long-Term Planning:** Planned gifts enable the school to engage in long-term strategic planning, knowing that there is a reliable source of support for future needs. This allows Nativity to focus on innovation, growth, and sustainability.



Nativity Preservation Support Foundation
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