



THE ORDER OF AUGUSTIN VEROT



Augustin Verot, first bishop of our Diocese of St. Augustine, had an abiding commitment to the growth of Catholicism in the diocese through education and encouragement of vocations. The *Order of Augustin Verot* recognizes the importance of gifts - bequests, insurance policies, charitable gift annuities, charitable remainder trusts, retirement plans or other instruments - for the ongoing work of our Church.

Membership in the *Order of Augustin Verot* is reserved to those individuals who notify the Diocese and/or Catholic Foundation they have made estate or deferred gift plans to benefit a Diocesan catholic entity.

BEQUEST GUIDE FOR THE CATHOLIC FOUNDATION & THE DIOCESE OF ST. AUGUSTINE SUGGESTED LANGUAGE

The following is suggested language to help express the wishes of the donor.

For a bequest or trust provision:

- 1) for an outright gift directly to a parish, school or ministry:

I devise (the sum of \$ _____) **OR** (an amount equal in value to ____% of my entire estate passing under this Will) to Felipe J. Estévez as Bishop of the Diocese of St. Augustine, or his successor in office, at 11625 Old St. Augustine Rd., Jacksonville, Florida 32258, for the use and benefit of _____ **NAME & ADDRESS OF PARISH, SCHOOL OR MINISTRY** (gift goes directly to entity when received)

- 2) for an endowed or perpetual gift to a parish, school or ministry:

I devise (the sum of \$ _____) **OR** (an amount equal in value to ____% of my entire estate passing under this Will) to Felipe J. Estévez as Bishop of the Diocese of St. Augustine, or his successor in office, at 11625 Old St. Augustine Rd., Jacksonville, Florida 32258, for The Catholic Foundation of the Diocese of St. Augustine, the interest income from said gift to be for the use and benefit of _____ **NAME & ADDRESS OF PARISH, SCHOOL OR MINISTRY** (gift goes into Foundation restricted for entity which receives earnings year after year)

To name a parish, school or ministry as beneficiary of an insurance policy, will, retirement plan or charitable remainder trust:

- 1) for an outright gift :

Felipe J. Estévez as Bishop of the Diocese of St. Augustine, or his successor in office, at 11625 Old St. Augustine Rd., Jacksonville, Florida 32258, for the use and benefit of _____ **NAME & ADDRESS OF PARISH, SCHOOL OR MINISTRY.** (gift goes directly to entity when received)

- 2) an endowed or perpetual gift :

Felipe J. Estévez as Bishop of the Diocese of St. Augustine, or his successor in office, at 11625 Old St. Augustine Rd., Jacksonville, Florida 32258, for The Catholic Foundation of the Diocese of St. Augustine, the interest income from said gift to be for the use and benefit of _____ **NAME & ADDRESS OF**

PARISH, SCHOOL OR MINISTRY (gift goes into Foundation restricted for entity which receives earnings year after year)

Legal Name for Catholic Charities:

“Catholic Charities Bureau, Inc., an entity of the Diocese of St. Augustine”

The following information is provided to assist you in developing your charitable gift and estate plans in consultation with your attorney, accountant, and/or other advisers.

We suggest that the following language should be used for making a gift to the Catholic Foundation by will or revocable trust:

"I hereby give to The Catholic Foundation of the Diocese of St. Augustine, a Florida not-for-profit Corporation, with its principal place of business at Jacksonville, Florida" [then insert one of the following:]

[for cash gifts] the sum of \$ _____ [amount]

AND/OR [for gifts of property] the following described property: _____ [description]

AND/OR for gifts of a portion of your estate] _____% of the residue of my estate (or trust)."

If your gift will be more than \$100,000, you may wish to create a named endowment fund by including the following language:

"The property comprising this gift may, for investment purposes, be merged with any of the Catholic Foundation's investment assets. However, the gift shall be entered in the foundation's books and records as the _____ [name] Fund, shall always be so designated, and the income there from, but not the principal, shall be used for _____ [stated purpose] of the Catholic Foundation, Diocese of St. Augustine, Florida."

You may wish to designate your gift for the benefit of a specific parish or Diocesan ministry. If you wish to do this, please include it in the body of your bequest, such as the following:

"I hereby give to The Catholic Foundation of the Diocese of St. Augustine, a Florida not-for-profit Corporation, with its principal place of business at Jacksonville, Florida, for the use and benefit of _____
(insert parish or ministry)

DIOCESE AS EXECUTOR

Most people designate a relative, friend or other trusted individuals who they name as personal representative (executor) of their estate. If you do not have anyone in this capacity, however, the Diocese is willing to act in this capacity when it is named as sole beneficiary of an estate. In that case, please use the following language:

Felipe J. Estévez or his successor, as Bishop of the Diocese of St. Augustine, Florida, or such person as he may designate in writing

GIFTS TO DIOCESE FOR IMMEDIATE USE

If you do not want your gift to become part of the Diocese's endowment fund, for use in perpetuity, you can also make a gift for immediate use. In this case, the legal name to be used when making gifts to Diocese via wills, trusts, and other gift-transfer documents is as follows:

"I hereby give to Felipe J. Estévez, and his successors, as Bishop of the Diocese of St. Augustine, Florida." [continue with same options as indicated above]