

Charitable Gift Annuities

Your gift to your parish could give you a 40% Tax Credit



FOUNDATION for the Diocese of Helena

to do just that AND save money on Montana taxes.

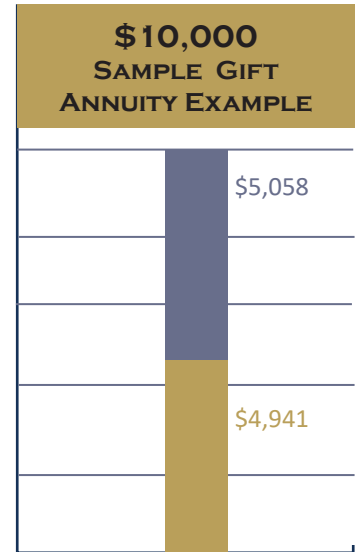
Montana is a unique state, committed to giving back to its nonprofits through the Montana Endowment Tax Credit. This piece of our tax code allows you to give to an endowment through a planned gift (charitable annuity), and then be able to claim a tax credit of 40% of the total charitable gift.

The Foundation offers annuities that support 161 different endowments within our diocese, including one for every parish as well as many Catholic ministries.

Each household is eligible for up to **\$10,000 Montana tax credit per spouse** (\$20,000 total). *Donate appreciated stock and your tax savings in capital gains could be even more!*

Imagine if you gave a gift and nearly HALF was returned to you in tax credits! Would it change the way you give?

We all love the Lord and want to support his work in our parishes and diocese. Annuities are a way



■ Total Tax Benefit
■ Total Charitable Gift

Learn More

Contact Executive Director,



Daniel Thies for more information and your *personalized* annuity illustration, (406)389-7051 or email

dthies@diocesehelena.org

How a Charitable Gift Annuity Works



Pray to the Lord about a gift, and if it's right . . .



. . . call The Foundation. We administer 161 endowments, investing (according to Catholic teachings), and providing the vehicles to make this gift charitable.



The State of Montana provides a 40% tax CREDIT.



The Federal Government offers a tax DEDUCTION