

# Peace of mind...

When you plan a legacy gift you are not parting with current income or assets. By sharing these assets after your lifetime, you may be able to leave a larger gift than you could today, helping even more people.

A deferred gift balances your concerns for the future with your desire to help those in need.

A well-planned legacy gift can maximize benefits for your family, the Sisters of Charity of New York, and the community.

*The Spirit of God incites us gently to do the good we can reasonably do so that good might be done effectively and for a long time.*

St. Vincent de Paul

## Getting Started

- ▶ Determine the people and charities you wish to support and the property you expect to have available.
- ▶ Consult with an attorney who regularly prepares wills and trusts.
- ▶ Contact the Sisters of Charity of New York to discuss your gift options and desires.
- ▶ Once your plans are in place, let us know so we can acknowledge and thank you for your intended gift.

One sentence in your will or trust has the power to support the Sisters of Charity of New York for many years to come. Your attorney can use the following language to create a bequest for the Sisters of Charity of New York:

"I give \$\_\_\_\_\_ (or "\_\_\_\_\_% of my estate," or "the following described property") to Sisters of Charity of New York, 6301 Riverdale Avenue, Bronx, NY 10471, for its general purposes.

**Legal Name:** Sisters of Charity of St. Vincent de Paul of New York

**Tax ID#:** 13-1740394

The information in this brochure is not intended as legal or tax advice. For legal or tax advice please consult an attorney or tax professional.

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SISTERS OF CHARITY  
OF NEW YORK

*Leave a Legacy  
of Love for the Poor*



  
SISTERS  
of CHARITY  
NEW YORK

# Do you have a will *or* trust?

There are many ways to provide for the security of those you love and still create a lasting legacy.

A will or a trust can provide you this opportunity.

Without documentation in a will, trust or beneficiary designation, state law determines how your assets are divided with no provisions for your friends, favorite charities, church or the community.

Did you know 50% of Americans do not have a will?

# What will your legacy be?

## How do I continue to support the work I love while planning for the future?

A legacy gift to the the Sisters of Charity will preserve your assets, provide tax benefits while you are alive, and allow the work you care about to continue.

**Charitable Bequest**– This is the most common type of deferred gift and is made through a will or trust.

**Retirement Plan Assets**– Naming the Sisters of Charity as the beneficiary of an IRA, 401(k), 403(b), Keogh, and other qualified plan can provide greater tax benefits to your heirs while maximizing the impact for the Sisters of Charity.

**Life Insurance**– The Sisters of Charity may be named as a beneficiary.

**Publicly Traded Stock**– May be transferred to the Sisters of Charity.

**Bank Accounts or CDs**– Most accounts will allow you to name the Sisters of Charity as “Payable on Death” beneficiary using a designation form.



The ministries sponsored by the Sister of Charity provide services of healthcare, housing, food, education, immigration services, advocacy and spiritual care. Our sisters and brothers in need, those whom society may forget, are greeted with compassion and a philosophy and values that ask, “what can I do for you?” We continue to sponsor programs of service done in our name, fostering the enduring spirit of charity of Vincent and Elizabeth. A deferred gift can continue this vital work and leave a lasting legacy.