



Heritage Newsletter

FALL 2013

A semiannual publication of the Catholic Diocese of Arlington

Fund your Passion into Perpetuity



During his first experience at The Catholic Diocese of Arlington WorkCamp program in 2006, Nick Buck saw teenagers living their faith by improving the lives of others in our diocese. Over the course of seven summers, Mr. Buck recalls being emotionally moved as he witnessed scores of life-changing faith experiences in teenagers, residents, and adult leaders. His conclusion: "What a difference we could make if every diocese in the nation followed this formula!"

As the father of two young adults, Nick witnessed teenagers' spiritual journeys through adolescence. "WorkCamp affords youth time away from distractions, with peers who are asking the same questions about their faith. Seeing Jesus in others can make all the difference. When they finish high school and go on their way in life, it's these faith experiences that will keep bringing them back to the Church."

As a big picture thinker in the world of business and government, so too is Nick Buck as he talks about his philanthropic vision. To put his giving wish into action, Nick was one of the

first donors to establish a Donor Advised Fund (DAF) at *The Foundation for the Catholic Diocese of Arlington*. Discussing his DAF with others, Nick realized that the physical challenges of homelessness and hunger can impede spiritual growth. "It's hard to maintain your faith in God's love when you're sleeping outside and haven't eaten."

Confident God was revealing a greater plan, Nick prayed on a name for this Donor Advised Fund and was led to the Archangel Raphael. His DAF is identified as *The Raphael Fund* because Raphael protects us in our physical and spiritual journey. *The Raphael Fund's* charitable intentions include:

- Ensuring WorkCamp has resources to continue in perpetuity as costs include unplanned materials and contractor expenses
- Increasing the potential for WorkCamp to attract new youth ministers in our diocese and dioceses throughout the United States
- Providing shelter for homeless youth within our diocesan boundaries

Nick's philanthropic interests are to assist youth in their spiritual journey with Christ, providing conditions that enable them to find and fall in love with Christ. This starts with ensur-



ing they have shelter if needed and follows with opportunity to participate in WorkCamp. Nick told us "God has done amazing things for me and I recognize that He does these things through each of us. We truly are His hands and feet. I'm blessed that the Lord would work through me to bring our youth to Him."

At 50 years young, Nick Buck has discerned his vocation and he is working to enact change during his lifetime. The Raphael Fund provides a way to ensure that even upon his death, his charitable giving will continue. Many of us have areas of interest we wish to benefit into perpetuity. Endowments and Donor Advised Funds can streamline your management of donations as you can contribute now to benefit into the future. As a busy husband, father,



volunteer, and business man, a final quote from Mr. Buck sums up his use of time "Thank you for what my DAF does. It really takes a lot of work off my plate and enables me to focus on the mission!"

Bishop Loverde's Pastoral Letter on the New Evangelization

In a September letter to Catholic Heritage Circle (CHC) members, Bishop Paul S. Loverde reflected that "The Year of Faith" declared by Pope Emeritus Benedict XVI was a summons to all Catholics to study and reflect on the precious gift of faith so that we may deepen our relationship with the Lord Jesus." He wrote "Many exciting initiatives by our parishes have helped active and inactive parishioners strengthen their faith and thus become the Church evangelizing." At the CHC Annual Dinner, Bishop Loverde announced that he would distribute a pastoral letter titled *Go Forth with Hearts on Fire!* This letter, released on the final day of the Year of Faith, November 24, 2013, seeks to answer what each of us should

continue to be doing now that the Year of Faith is over "At the close of the Year of Faith and on the cusp of a new liturgical year, I challenge all Catholics to lead efforts for greater evangelization, to go out and make disciples!"



"I pray that this letter," writes Bishop Loverde, "helps you to take specific and concrete steps in drawing closer to Jesus Christ and proclaiming Him to others." As Bishop Loverde said recently, "The mission territory you and I have been called to in a particular way is right here in our local zip codes. Right here in our homes, neighborhoods, and places of work. What would it look like if you and I and every one of the half-million Catholics in our diocese woke up tomorrow and viewed themselves as on a mission? After all, Jesus tells us to 'Cast out into the deep' as He promises 'I am with you always.' Each of us is to be a fisher of men. There is much we are doing and will continue to do in the year ahead to help each of you and others share and grow in our Catholic faith in Jesus Christ." The Diocesan New Evangelization Initiative is supporting this effort with tools for parish-based evangelization efforts and adult faith formation programs. To learn more and to read *Go Forth* online, please visit www.heartsonfire.arlingtondiocese.org.

Highlights from the 2013 Annual Appreciation Dinner



The 7th Annual Catholic Heritage Circle (CHC) Appreciation Dinner was held at Our Lady of Good Counsel (OLGC) DeSales Hall on November 2, 2013. In attendance, we were honored

to include three Franciscan Sisters who reside and work in our diocese. Sister Kathryn is from St. Rose of Lima Priests' Retirement Villa where she works as Residential Manager for our retired diocesan priests. The Director of our Respect Life Office, Sister Clare, works closely with Catholic School and Youth Ministry offices to teach and educate youth and adults about the importance of respecting life from conception until natural death. Also, Sister Judith, Superior of the Franciscan Sisters of the Eucharist Convent at St. Philips who is the Health Care Coordinator for retired priests and a nurse at Inova Fairfax Hospital.

The Vigil Mass that evening was celebrated by Reverend Mark S. Mealey. Fr. Mealey also spoke at the dinner as he serves in many roles for our diocese. As Vicar General for Administration and Moderator of the Curia for the Diocese, he acts on behalf of Bishop Loverde in administration of the diocese. He is President of The Foundation for the Catholic Diocese of Arlington and Judicial Vicar in the

Office for Canonical Affairs and the Tribunal. Fr. Mealey talked of operations within the diocese and addressed the designating of a future bequest by explaining how "*at the discretion of the Bishop*" is put into action.

Our keynote speaker was His Excellency Most Reverend Paul S. Loverde. Bishop Loverde's words emphasized the continued need for evangelization. He included reference to the history of our Pope's speaking on the topic and most recently, Pope Francis' releasing "The Light of Faith", his first evangelization letter. In this letter, Pope Francis wrote "We must nourish our faith so it can illuminate our lives and the world we live in."

Bishop Loverde thanked members of the Catholic Heritage Circle for their dedication to our diocese and foresight in planning their estate. This gratitude was not only on his behalf but for the many people who ultimately benefit from parishioner's financial support. We have confirmed November 1, 2014 (*All Saints Day*) for our 8th Annual Dinner. As the month of the Holy Souls arrives, we shall have the opportunity to pray together for those dear to us who have gone before us marked by the sign of faith.





THE FOUNDATION FOR THE CATHOLIC DIOCESE OF ARLINGTON

Building a Legacy for our Diocese

When planning your legacy, have you considered the advantages of planned and ongoing funding through donations to a foundation fund? *The Foundation for the Catholic Diocese of Arlington* (Foundation), a 501(c) (3) public charity, was created in 2011, and operates exclusively, for charitable purposes. It is an autonomous organization. Individuals and families may establish or direct their philanthropic support to include, but are not limited to:

- Restricted Endowment Funds
- Donor-Advised Funds
- Memorial Funds
- Scholarship Funds
- Unrestricted Endowment Fund

Donors can personalize their giving to realize their dreams into perpetuity. Our Foundation works primarily with parishes, schools, diocesan ministries and other entities within the diocese to complement their current

development efforts and assist them in securing long-term and strategic philanthropic support. Assistance to other entities aligned with the principles of the Roman Catholic Church is provided as needed. The Foundation can receive outright gifts to facilitate annual charitable giving (cash, appreciated securities, and other assets) and/or may involve managing a significant windfall or charitable investment in a given year for distribution over a number of years. For more information on the Foundation, please complete and return the form below.



You are Invited to Learn More

The Office of Development offers a free educational seminar to assist parishioners in obtaining a better understanding of the sometimes complex process of estate planning. **Winter 2014 Catholic Estate Planning Seminars are being scheduled at parishes throughout the diocese.** Contact us at (703) 841-3819 for dates and locations.

IRA Charitable Rollover ends December 31

The American Taxpayer Relief Act of 2012 extended the IRA Charitable Rollover through December 31, 2013. Originally passed in 2006 as part of the Pension Protection Act, the IRA Charitable Rollover allows individuals age 70½ and older to make direct transfers totaling up to \$100,000 per taxpayer per year to 501(c)(3) charities, without having to count the transfers as income for federal income tax purposes. Individuals who are age 70½ and older at the time of the contribution can transfer up to \$100,000 per year per taxpayer from their IRAs directly to their parish or the Catholic Diocese of Arlington.

This IRA charitable rollover counts towards your minimum required distributions for the year. To complete an IRA charitable rollover, the first step is to contact your IRA provider to learn their procedures. We also offer a sample letter for your use to initiate a rollover.

Questions can be directed to Lou Ann Armstrong, Director – Special Gifts at (703) 841-3819 or l.armstrong@arlingtondiocese.org.

PLEASE COMPLETE AND MAIL THIS FORM



Please Send Me the Following Workbook/Information:

- A Catholic Estate and Personal Planning Workbook
- A Catholic Advance Medical Directive
- I'm interested in Charitable Gift Annuities. Please send me complementary proposal information; My/our dates(s) of birth: _____ / _____
- I am considering a bequest to our church and request approved bequest language
- Information on establishing a Fund within *The Foundation for the Catholic Diocese of Arlington*



- I have already made provisions in my estate plans for a bequest to my parish and/or the diocese and would like additional information about becoming a member of the Catholic Heritage Circle.

Procrastinate at Your Own Risk

It is human nature to put off doing things that we choose not to confront. Each of us has a list of those aggravations, irritants, or nuisance chores that are so very easy to postpone. Other more important tasks, however, need to be accomplished because the opportunity is limited. Deadlines come but they don't go away, except in one's rearview mirror. Procrastination is the act of delaying something until later, yet what if "later" doesn't apply? This can and does happen if we wait too long to plan our estate. People do die unexpectedly, leaving behind a confusion that loved ones must sort through and solve.

If a deceased person's will or revocable living trust is not up-to-date (or valid), it does not mean that nothing happens. The last, legally effective document will govern, even if it leaves out a new would-be heir like a grandchild or attempts to convey property no longer owned.

Those who die without a will or living trust will have an estate that is subject to the inflexible laws of the state, not the wishes of the deceased. A court will appoint a lawyer to give full effect to those laws, pay claims, and distribute assets according to a rigid formula. That court will be either unaware or unconcerned with the priorities of the deceased.

If parents die while putting off the selection of a guardian for their minor children, the support system will be unresolved until a court decides on the children's future. If you delayed naming your church in your will or as a beneficiary of your life insurance or IRA until it is too late, good intentions will not take effect when you are gone. Worse, details you might have wanted to resolve can fall to family members who are forced to manage them in a time of grieving or financial uncertainty. In these cases, an opportunity is missed.

The length of our life is uncertain and comes with no guarantees. These reasons and others are why we encourage all of our parishioners not to wait on their estate-planning responsibilities. We have seen that proper planning usually means a smooth handling of estate matters, while failure to plan frequently leads to complications, heartache, and needless expenses. We have prepared a *Catholic Estate and Personal Planning Workbook* which includes perspectives in line with Catholic Rites. A workbook can be sent to you quickly (we won't procrastinate!) at no cost or obligation. It has prepared others to meet with their advisers and saved legal fees, and it might do the same for you. To order, you can complete the attached form.



Upcoming Events

Catholic Heritage Circle (CHC) members often express interest in learning more about diocesan programs. We have found that being able to visit program sites is a relished opportunity. Therefore, we are now planning a spring daytime event and would appreciate input as to the types of activities that would be of most interest to you. Ideas include a visit to the Saint Rose of Lima Priests' Retirement Villa, a tour of a Catholic Charities site, or a mass at Mount St. Mary's University Seminary or Grotto, to name a few.

To receive our Catholic Heritage Circle Future Planning survey which includes details of activity options, please contact Peggy Tripp in our Planned Giving office at: (703) 841-3826 or via email at p.tripps@arlingtondiocese.org. Your feedback is important to us as we try to expand awareness of and participation in the CHC recognition program.

IRS CIRCULAR 230 NOTICE: *We encourage you to seek legal and tax advice in connection with gift and planning matters, as neither the Catholic Diocese of Arlington, nor any of its employees, can provide any legal or tax advice.*

Please tear off and return in the enclosed envelope. (Fall 2013)

Please contact me (us) via email. The email address is: _____

Please contact me (us) by phone at: _____

Name _____

Mailing Address _____

City _____ State _____ Zip _____

Mail this form to: The Catholic Diocese of Arlington, 200 N. Glebe Rd., Suite 811, Arlington, VA 22203