



HERITAGE NEWSLETTER

SPRING 2013

A semiannual publication of the Catholic Diocese of Arlington

A Lifetime of Giving: Following Biblical Teachings



When Bob Thome died in November 2010, each of his 24 nieces and nephews received a small portion of his estate, as were the intentions expressed in his will. Inspired by Thome's lifetime of generosity, many of his nieces and nephews donated their bequest straight to charity.

"We knew that's what he would have wanted," said Gary Shiple, his nephew and caretaker in his final

years. "That's just the way that Bob lived his life."

Thome had an innate sense of placing the needs of others before his own, and in a final act of selfless charity, he left 97% of his estate to seven Catholic charities close to his heart—one of which was Catholic Charities in the Diocese of Arlington.

Thome retired to Clifton in 1988 after working as an IBM engineer for 37 years. A lifelong Catholic, he was active in many facets of the Diocese of Arlington—attending daily mass at St. Andrew the Apostle and taking trips with the Catholic Singles Group.

Never having children of his own, Thome embraced his vocation to the single life which allowed him to be a father-figure to many different types

of people—including his nieces and nephews and many children that he would never even meet.

Throughout his life, Thome's charitable giving was often directed to orphans and underprivileged children. When he found out that Shiple was taking his family on a trip to Peru, he insisted on making an impromptu visit to their house before they left. Thome gave him an envelope with \$1,000 and instructions to deliver it to a specific orphanage in Lima. Thome had traveled to Peru the year before and visited this same orphanage. The orphanage's modest conditions and passionate work captured a piece of his heart, and Thome had finally found a way to offer his support.

"All of his giving was very biblical," Shiple said. "Jesus said to take care of the widows and the orphans, and that's exactly what Bob strived to do."

Thome's generous gift will allow Catholic Charities to meet the immediate needs of our vulnerable brothers and sisters in our diocese, as well as life-changing services that help entire families and subsequent generations. It is our hope that Thome's Christian witness and kindness will inspire others who may also be planning a similar planned gift.

In This Issue

- Bishop Paul S. Loverde's Evangelization Initiative
- Highlights from the 2012 CHC Appreciation Dinner

Catholic Diocese of Arlington • Planned Giving Office • 200 N. Glebe Rd., Ste. 811, Arlington, VA 22203
(703) 841-3819 • www.arlingtondiocese.planyourlegacy.org

Bishop Loverde's Evangelization Initiative

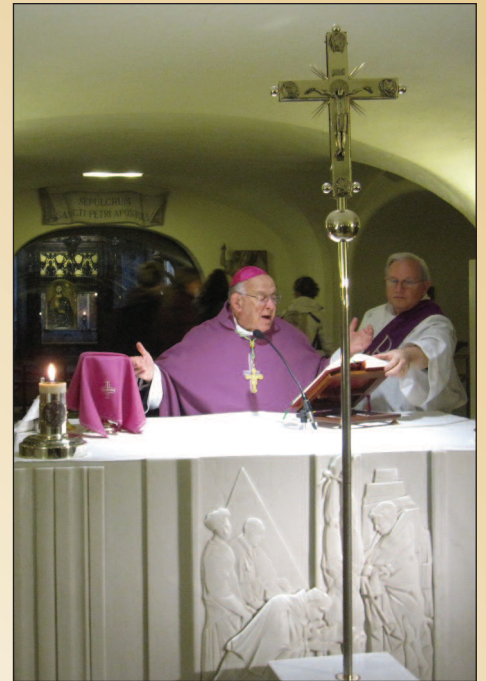
As we continue our journey during the the *Year of Faith* (October 11, 2012 to November 24, 2013), Bishop Loverde has invited all parishioners to rediscover Christ. "You and I are being called to a deeper personal relationship with the Lord Jesus within the Community of His Disciples, the Church" said Bishop Loverde. To promote the Year of Faith and the New Evangelization, the diocese launched *Heart Speaks to Heart*, a web-based



portal with evangelization tools and resources, information on enriching events, and opportunities to connect through social media.

Heart Speaks to Heart invites all Catholics to **Grow** by discovering tools to deepen and share our Catholic Faith; to **Pray** and draw closer to our Lord; to **Network** by finding local Catholics who are excited to share their faith; and to learn more about **Events** such as faith formation talks, workshops, and retreats within our diocese.

As a diocesan family of faith, we are all being invited not only to delve more deeply into our relationship with Christ, but also to share the Good News with others. Bishop Loverde's WTOP radio spots, video clips, and other messages welcome all to draw near to Christ and His Church and can be found at www.yearoffaith.arlingtondiocese.org.



A recommended resource on discipleship and evangelization is a newly released book by author Sherry A. Weddell titled *Forming Intentional Disciples: The Path to Knowing and Following Jesus*.

Highlights from the 2012 CHC Appreciation Dinner

The 6th annual Catholic Heritage Circle (CHC) Appreciation Dinner was held at our Cathedral of St. Thomas More in November 2012. All attendees had the opportunity to have their picture taken with Bishop Loverde. The photos were placed in CHC crested frames and distributed at the conclusion of dinner. We plan to offer the same opportunity to those who attend this year's dinner.

As the presentation began, Bishop Paul S. Loverde expressed gratitude for "your ongoing stewardship and your future gift planning." He continued, "This is not only on my behalf but on behalf of the many people who ultimately benefit from your financial support." Oftentimes, Bishop Loverde has received a check from someone's estate after the person has passed away and thus missed the opportunity to thank him or her in person. While thankful for the gift, he has been saddened that he never met the person and had the chance to offer his thanks. The CHC, and especially this dinner, offer Bishop Loverde the opportunity to express his gratitude in person.

An announcement of the *Year of Faith* was made. This Year may be temporal in that it ends on November 24, 2013,

but it is a timeless gift. It is with prayerful thought that we hope this year is a catalyst for the New Evangelization that can substantially change one's entire life. As the Holy Father pointed out, to enter the door of faith is to set out on a journey that lasts a lifetime, beginning at Baptism and ending at the passage of death into eternal life.

Bishop Loverde highlighted several diocesan programs and education efforts that benefit from the generosity of donors. While the *Bishop's Lenten Appeal* supports annual programs such as seminarian education, future bequests can provide strategic funding to help increase diocesan endowment funds or provide for future capital needs. "The special needs I see we face total over \$40 million in strategic new funds and I have begun an effort to make people like you aware of these concerns." His remarks were concluded with particular thoughtfulness: "I am so very grateful for the wonderful witness of stewardship that I see from people like you who want to help our Catholic faith be strengthened. Please be assured of my ongoing prayers for you and your families."



Foundation for the Catholic Diocese of Arlington makes First Distribution

Christ House in Alexandria was Recipient of Grant

April 29, 2013 – The Foundation for the Catholic Diocese of Arlington (Foundation), a 501(c) (3) public charity, has made its first distribution from a Donor Advised Fund (DAF).

The Foundation began as a conversation driven by parishioners verbalizing their interest in establishing endowments which could allow for donating in the present to care for Church needs into perpetuity. While the concept of having a foundation is not new; within the tax regulation, legal costs, and donor options of this millennium, the timing was right for our Diocese to establish a Foundation which could assist parishioners in finding ways to enhance their charitable giving.

The primary purpose of establishing a DAF in the Foundation is to provide donors with the programs, tools, resources, and support to make charitable giving simple and to carry out the legacy of their family's stewardship. The mission of the Foundation is to receive and steward charitable gifts in support of the spiritual, educational, and social service needs of families and individuals by helping provide for the long-term financial stability of parishes, schools, diocesan ministries, and other entities aligned with the principles of the

Roman Catholic Church. A majority of grant recipients will be within the geographic boundaries of the Catholic Diocese of Arlington.

Christ House Men's Shelter in the City of Alexandria was a wonderful donor choice to receive the first Grant made through this Foundation. Christ House is a Catholic Charities of Arlington program which acts within their mission to extend services and resources to all in need. "I can think of no better expression of *Faith in Action* than the work at Christ House" said Joe Guiffre, Chairman of the Board for the Foundation. "This first gift from a DAF is an example of the use of a donor advising funding for programs in the diocese. Christ House does two things well. It feeds the hungry and, provides a way out of dependency by offering men the help needed to break away from homelessness and to provide for themselves by getting work."

All parishioners are eligible to establish a Donor Advised Fund within this Foundation. The Foundation was created in 2011 as a means for giving. The Catholic Diocese of Arlington is geographically comprised of seven cities and 21 counties within the Commonwealth of Virginia.

- 3 -

Meet the New Director of Special Gifts



Lou Ann Armstrong
Director,
Special Gifts –
Planned and
Deferred Giving

Lou Ann joined the Office of Development staff to work with donors making Special Gifts along with The Foundation for the Catholic Diocese of Arlington.

Properly planning your estate can help prepare for your future and provide for the Church. Often, parishioners contact the Office of Development seeking assistance as they plan their estate and consider naming a parish and/or the diocese in their will or trust. Special Gifts range from a donation of real estate or jewelry, to establishing a high yield gift annuity or a bequest upon death.

Lou Ann has over 30 years of professional financial experience. She has resided in our diocese since 1982 and is a parishioner at St. Thomas á Becket in Reston. If you have questions regarding charitable gift planning please contact Lou Ann Armstrong 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 Donor Advised Fund within Diocese Foundation



- 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*.

Life Insurance Left Behind

Most of us acquire life insurance to help fund a personal need in case we should not live as long as we hoped. Fortunately, many of us outlive our worst-case scenario. The typical result is that our insurance contract is in force, paid regularly (maybe even paid up), and growing in value even as our life is lengthening. In the meantime, perhaps our other assets are growing to the point where the protection we sought isn't as important.

The policy becomes a "hidden" asset evidenced only by a file that we add to when the annual statement arrives. The value of the policy seems to be essentially frozen, even dormant. If it has little benefit to you today, what does

that suggest if it really isn't needed by your heirs to provide estate liquidity? Is there a better use for such a policy?

A future endowment named for you or a loved one could be the result. That nearly forgotten contract could also add significantly to our annual appeal or be given to support a capital project that is important to you. After all, this is an asset that you have held for some time, and it can have an impact that reflects its history.

If you are currently paying premiums on an older policy or have insurance you may like to contribute, we are here to help as you explore how it might work as a gift to our church.



Upcoming Events

The CHC Dinner is held each year to thank parishioners who have named their parish, school, diocesan program, or diocesan ministry in their estate plans.

These Planned Giving donors are invited to join Bishop Loverde and other guests on:

All Souls Day,
Saturday, November 2, 2013
at 6:30 pm at
Our Lady of Good Counsel
Parish in Vienna, Virginia.
Invitations will be mailed
in the fall.

Join Us and 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. Topics include: the legal steps required in personal planning, understanding wills and trusts, power of attorney, and an overview of charitable vehicles for estate planning. Furthermore, a summary of the Catholic Advance Medical Directives is presented.

A Spring 2013 Catholic Estate Planning Seminar will be held at 7 pm on Monday, June 10 at St. Mary of Sorrows Parish in Fairfax.

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.

**Catholic Diocese of Arlington • Planned Giving Office • 200 N. Glebe Rd., Ste. 811, Arlington, VA 22203
(703) 841-3819 • www.arlingtondiocese.planyourlegacy.org**

- 4 -

Please tear off and return in the enclosed envelope.

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