

# Intro

An estate plan ensures the people and charities you care about are protected.

Estate Planning should not be just about the transmission of wealth, but about the transmission of your values and beliefs. You can integrate your religious considerations into the estate planning process.

We suggest you engage one or more of the following:

- Estate Planning Attorney
  - Certified Public Accountant
  - Trust Officer or Financial Planner
- Investors, who adhere to the principles outlined by the **Catholic Framework for Economic Life** (by the U.S. Bishops' Conference). These guidelines demonstrate how you can base your decisions on human dignity and moral law, consistent with Catholic values.

## Learn More

Scan this with your phone's camera & tap the link.

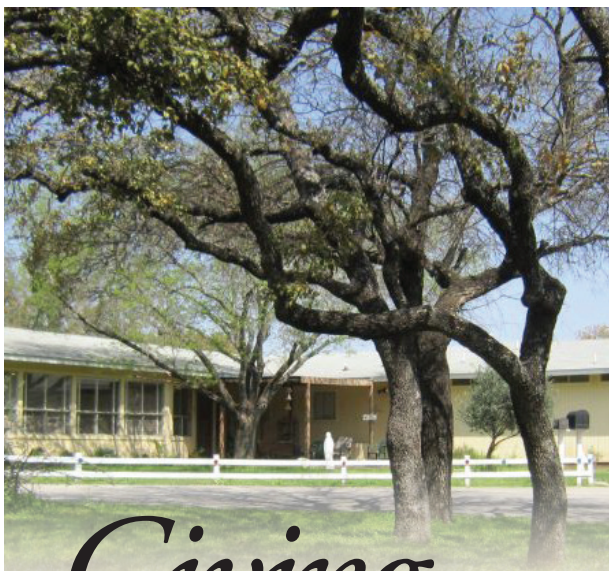


Office: 210-521-3377

Development@PilgrimCenterOfHope.org

[PilgrimCenterOfHope.org/Estate](https://PilgrimCenterOfHope.org/Estate)

7680 Joe Newton, San Antonio, TX 78251



# Giving

We would be honored if you would consider including Pilgrim Center of Hope in your estate plan with a charitable bequest or another planned giving option.

By generously allocating a planned gift, you are making an investment in the future, so that our ministry can continue to draw people into, and back to, the Catholic faith for decades to come.

At a time when the culture is increasingly antithetical to Christian values and religious practice, your gift will make an enormous impact.

*Thank you.*

References:

"A Guide to Faith-Based Investing," Lisa Smith for *Investopedia* (2022).

"Catholic Framework for Economic Life," United States Conference of Catholic Bishops (2015).

"Catholic Values Investing," Morgan Stanley (2020).

# A Testament to HOPE

## ESTATE PLANNING

Leave a lasting legacy for the future and a testament to your loved ones.



**PILGRIM**  
Center of Hope

Guiding people to Christ

# The Benefits

## What An Estate Plan Can Do for You



Preserve the value of your assets



Reduce unnecessary taxes and expenses



Ensure loved ones and charities receive what you intended



Manage your assets for you and your loved ones in the event of disability or incapacity



Protect your privacy

## Your Will

- This document details how **you** want your assets to be distributed upon your passing.
- It can also appoint a guardian for any dependents in your care.
- A Will can name an individual or entity to administer your estate.

## What Is Probate?

Probate is the legal process intended to protect and direct the distribution of property according to your will. However, not all of your assets go through probate.



## Other Considerations

**Revocable Living Trust** - can work in coordination with your Will, and may help ensure more seamless management of your assets in the event you become incapacitated. It can also help ensure your estate plan is kept private and potentially avoid your state's probate process.

**Power of Attorney for Finances** - ensures someone you trust will have legal authority to take care of financial matters if you cannot. The tasks may range from paying bills to filing taxes.

**Power of Attorney for Health Care** - also known as a health care proxy, this document names one or more individuals who can make decisions on your behalf if you become incapacitated.

# Give Hope

An **Expedited Estate Plan** includes assets that pass outside your Will and do not need to go through the probate process.

**Beneficiary designations** and **asset titling** are methods used to support loved ones, or go to a charitable organization to create a lasting impact. They can accomplish this quickly, because they are not required to go through the probate process.

Coordinate beneficiary designations into your Estate Plan. Beneficiary designations are common with life insurance, pensions, IRAs, Donor Advised Funds, 401(k) and 403(b) plans. When you name a beneficiary on these accounts, the accounts are distributed directly to the beneficiary after your lifetime.

## PILGRIM CENTER *of* HOPE

A legacy gift is a powerful way to make the transformative word of Christ heard, spreading hope to a world in need of hope.

*Please see back panel.*