

PLANNING FROM THE HEART

INSPIRATIONAL STORIES, NEWS AND CHARITABLE GIVING STRATEGIES

Why We Included the Idaho Catholic Church in Our Estate Plan: Karen Mahoney

“So what are your plans for your finances after you die?” is not generally a dinner table discussion. It’s not often a discussion at all as folks don’t want to think about their demise, let alone what will happen to all their “stuff.”

Shortly after we got married, Ed and I felt the need to put together a will. Truthfully, it was to set up guardianship for the kids, should we pass away, but dealing with our accounts and assets obviously became part of that equation.

I’m a cradle Catholic, and Ed went through RCIA in 2002. Our will has changed a few times over the past 20 years, but one thing has been constant: the Catholic Church has been designated to receive a part of our estate.

The decision for us was pretty easy—we are simply giving back to the Church that has given us so much, more than we could repay financially. The Catholic Church is known worldwide for its relief services. Catholic charities are some of the best and most efficient relief organizations.

Our local St. Vincent de Paul chapters, our Catholic schools (shout out to St. Ignatius—I’m a little biased—and Bishop Kelly) and their respective foundations and the programs offered by the diocese throughout the state are all striving to make the world a better place.

Being Catholic is part of the fiber of my being, and making the decision to give back to that organization when we die was super easy.

Estate planning is an important project. By including the Idaho Catholic Church, you’ll be leaving a legacy that reflects your values and is aligned with your Catholic faith. To learn more, please visit www.idahocatholicfoundation.org or contact Margaret Hampton at mhampton@rcdb.org or (208) 342-1311, Ext. 5139.



Karen and Ed Mahoney



Why You Should Plan Ahead

Can't predict what's next? It's tempting to put planning on hold. Unfortunately, loose ends can lead to future stress and rash decisions.

Consider this: Planning under "normal" circumstances allows you to slow down and review your options. For example, taking the time to be mindful when creating an estate plan gives you the opportunity to record your values and make sure your wishes are followed. A thoughtful estate plan can also tell your story through the causes you support after your lifetime.

A well-planned estate helps you:

- **Make the most of your assets.** Meeting with qualified professionals helps you grow your wealth over the long term.
- **Protect family and loved ones.** An up-to-date estate plan keeps loved ones safe. Reviewing it regularly means adjusting for changes in personal relationships, tax laws, births, deaths and state of residence.
- **Be tax smart.** Certain assets can be tax burdens (or at least tax surprises) to your family. Planning helps you keep them in the loop and possibly avoid a tax hit altogether.
- **Continue helping others after your lifetime.** Gifts to the Idaho Catholic Church may provide you financial benefits in addition to the fulfillment that comes from helping the people we serve.

Right now, wrestling with a portfolio of estate documents may feel daunting. That's why we're excited to offer you complimentary access to Giving Docs. This safe, easy-to-use independent platform makes it convenient to access your estate plan online.

You can create or update:

- Your will
- Health care directives
- Power of attorney and more!

We hope you take advantage of this special offer. Just use the QR code below to access Giving Docs or visit givingdocs.com/catholicidaho. You have the power to plan your future today. If you have questions, please don't hesitate to contact Margaret Hampton at no obligation.

We Can Help

Contact us to learn more about including the Catholic Church in your future plans or point your cell phone camera at the QR code to the right. Click on the notification that pops up in order to be directed to the Giving Docs page where you'll find tools to help you create an estate plan for free. You also can visit givingdocs.com/catholicidaho to get started today.



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