

PLANNING FROM THE HEART

INSPIRATIONAL STORIES, NEWS AND CHARITABLE GIVING STRATEGIES

Supporting the Parishes Important to Their Spiritual Journey

A Donor Advised Fund Is Their Gift of Choice

“Our faith and love are the glue that holds a civilized society together.”

Mary Hasenoehrl and Doug Gross had to use those words as their foundation when each suddenly lost their longtime spouses 11 and 10 years ago, respectively. They were here one day and gone the next.

“Ironically, neither of us grew up Catholic. It was our deceased spouses who introduced us to the Catholic faith,” Mary said. “We were married in 2014 and have put together a new life that spans from Moscow to Boise. We are connected to St. Augustine’s Church on the University of Idaho Campus, All Saint’s Parish in Lewiston, Our Lady of the Lake in McCall, Our Lady of the Valley in Caldwell and St. John’s Cathedral in Boise, and we have grandkids who have or will be attending three different Catholic schools.

“While it seems as though we are always on the go, we feel very much at home in any of the parishes. We have been so blessed in many ways, and it is our desire to give back to each of the communities that have been so important in our spiritual journey.”

Mary and Doug were introduced to the concept of a donor advised fund (DAF) several years ago by a financial advisor. A DAF allowed them to make a tax-deductible donation while keeping the money working until they were ready to recommend which qualified charitable organization they wanted to contribute to.

“We liked the DAF at the Idaho Catholic Foundation, because we know the investment strategy meets our standards. It is also easy to use. Simply log in and use the drop box, which lists the Idaho parishes and schools, and designate our donation.”

Creating a donor advised fund with the Idaho Catholic Foundation means total certainty about driving your philanthropy to charities and causes aligned to 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.



*Doug Gross and
Mary Hasenoehrl*



Ensuring Your Gifts Align to Your Catholic Values

The Idaho Catholic Foundation has partnered with the Knights of Columbus Charitable Fund to provide donor advised funds for our constituents.

You can give with confidence knowing that you are supporting the charities and causes aligned to your Catholic faith.

The fund is user-friendly, offers a platform for more consistent giving and may provide a tax benefit depending on your personal circumstances.

Benefits of Choosing the Idaho Catholic Foundation

- You can recommend grants to charities that align with your Catholic faith and do not contradict the teachings of the Catholic Church as defined by the Magisterium of the Roman Catholic Church.
- You can contribute a wide range of assets and invest your gifts in a variety of mutual funds.
- You will receive peace of mind knowing that you can name one generation of successors to your Idaho Catholic Foundation DAF, establishing a legacy of giving.

The Power of Your Donor Advised Fund

Simple record-keeping, tax-savvy contributions...the reasons to open a donor advised fund (DAF) are many. There are a few ways to further optimize this charitable savings account to do the most good.

Have You Used Your DAF to the Fullest? Here Are Some Ideas

- Itemize your taxes to realize an income tax charitable deduction from DAF contributions.
- Transfer complex assets, such as real estate or business interests, into your DAF account without incurring capital gains taxes.
- Designate your DAF as the beneficiary of your IRA or charitable remainder trust.

Additionally: You can designate the balance of a DAF to the Church after your lifetime.

You can choose to have any remaining DAF funds distributed to the Catholic Church after you pass by naming the Church as a beneficiary of all or a portion of the remaining funds. If you choose to do so, please use the following legal name and tax identification:

Legal Name: The Roman Catholic Diocese of Boise

Tax ID: 82-0200748



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