

Join the Pius XI Legacy Society: Planned Giving Opportunities

It's never too early to give yourself peace of mind by ensuring a thoughtful estate plan is in place. An estate plan is also a smart way to shape your legacy and support the transformational experience of a Pius XI Catholic High School education for future generations of Popes. Your thoughtful planning today will ensure that we can continue to help all in our care reach their own unique and highest potential as we nurture students to excel academically, develop moral courage, and live lives of faith and service.

The Pius XI Legacy Society was established to recognize and honor the generous benefactors who have created personal legacies through their estate or a planned gift to Pius XI Catholic High School. Such gifts, include:

- ❖ Bequests for Pius XI in a will or trust
- ❖ Appreciated assets such as securities and real estate
- ❖ Life insurance with Pius XI as the beneficiary or owner
- ❖ Charitable remainder trusts
- ❖ Charitable lead trusts

To discuss how you can maximize your legacy, please contact your estate attorney and/or financial advisor.

SAMPLE BEQUEST LANGUAGE

The following language is meant to serve as a guide. Please seek legal counsel for specific language.

Specific Dollar Amount of an Estate

This language is to be used when you want to give a specific amount of money (e.g. \$100,000) to Pius XI. If you would like to designate the funds go towards an endowment or specific fund or project, please include that information.

"I give, devise and bequeath to Pius XI Catholic High School (Tax ID: 39-1101976), a nonprofit organization located in Milwaukee, Wisconsin the sum of \$_____ (or _____ asset) to be used where it determines the need is greatest (or for the support of a specific fund or program)."

Specific Percentage of an Estate

This language is to be used when you want to give a specific percent of your estate (e.g. 5%) to Pius XI. If you would like to designate the funds go towards an endowment or specific fund or project, please include that information.

"I give, devise and bequeath to Pius XI Catholic High School (Tax ID: 39-1101976), a nonprofit organization located in Milwaukee, Wisconsin _____% of my estate to be used where it determines the need is greatest (or for the support of a specific fund or program)."

Percent, Fixed Amount Or ALL of the Remainder of the Estate

This language is to be used when you want to give either a portion (set amount of money or a percentage) or all of the remainder of your estate after all other bequests in the will or trust and any estate expenses have been dispersed. This makes the amount to be received by Pius XI variable. While this option provides flexibility, it could result in no gift to Pius XI depending on other priorities and obligations. If you would like to designate the funds go towards an endowment or specific fund or project, please include that information.

"I give, devise and bequeath to Pius XI Catholic High School (Tax ID: 39-1101976), a nonprofit organization located in Milwaukee, Wisconsin all OR \$_____ or _____% of the rest, residue and remainder of my estate to be used where it determines the need is greatest (or for the support of a specific fund or program)."