



Legacies

LIVING LEGACY CIRCLE NEWS

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Values are Foundation of Legacy Plan for Omaha Couple



When it came time to make an estate plan, Tricia and Mark Weber of Omaha reflected on what they valued most in their lives. Those values became the foundation of their plan for their legacy.

“Legacy to me is like leaving footprints on the beach. You want someone to know you’ve been here, that you passed this way during your lifetime,” Mark said. “Legacy to us is two-fold. Our first legacy is to leave good citizens. So we hope we have done a good job of passing our values on to our children. Our second legacy is to our community.”

Tricia and Mark are members of St. Wenceslaus Church and have been active in a variety of organizations in Omaha that have made an impact on their lives and that of their children, in particular, through their Catholic education. That’s why it was important for them to include the Archdiocese of Omaha in their estate plan.

“We raised five children together. They all attended Catholic schools. We are very proud of the adults they have become. They are spiritual, they work hard and they contribute to society. We attribute much of that success to Catholic schools,” said Tricia.

“Our hope, our bequest, is that we can help other children attain a Catholic education that they might not have gotten to have otherwise.”

As a professional financial planner and attorney, Mark said he often sees what happens to families when there isn’t a clear plan in place. “We see many families over the years destroy themselves because (the children) receive large sums of money from their parents with little direction. I believe that most kids want to do what their parents want them to do if they have direction,” he said. “Without a plan, for those kids, it’s almost as if they won the lottery, and they feel they can do whatever they want.”

To ensure that won’t happen to their family,

Continued on page 2

IN THIS ISSUE

Your Life &
Your Goals

Take a Turn in the
Right Direction

Coming to a Parish
Near You!

Values are Foundation... (Cont. from page 1)

Tricia and Mark regularly update their estate plan and communicate to all of their children so they know what to expect.

Mark said that clarifying your priorities is a good start to planning your legacy. "If I were to talk to someone about why I think it's important for them to give back, first I'd ask who is important during their lifetime? We all had someone helping us along the way – whether it was a parent, a teacher, a mentor – every step of the way, someone has helped all of us. I would encourage people to think back on those who have been instrumental in their own success and how they might give back when they die to say, 'thank you.' I think it's an obligation for all of us."

Learn more about how you can become a member of the Living Legacy Circle like Tricia and Mark Weber and how your legacy can make a difference right here in the Archdiocese of Omaha by contacting:

Tony LaMar

Legacy Planning Officer

Archdiocese of Omaha
Stewardship & Development Office

402-557-5650

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Your Life & Your Goals

While the world may not be quite ready for a self-driving car, it is nice to imagine a car that could give you peace of mind by avoiding traffic jams, save you time by getting you to your destination sooner and which could save you money by reducing fuel consumption.

While we can't give you a car, we can help give you peace of mind and help you save time and money.

Most of your wealth is probably invested in your home, a bank or other investment accounts.

These assets can all be transferred to your loved ones or benefit our Church without you ever writing a will. By making a simple change, these assets can go automatically to the beneficiaries you select.



- **Life Insurance** – Complete a beneficiary designation form, designating a person or charitable beneficiary for your life insurance policy.
- **IRA** – Complete a beneficiary designation form to benefit the people and causes most important to you. Many administrators now make these forms available online.

- **Investment, Checking and Retirement Accounts** – List your loved ones or favorite causes as payable on death beneficiaries on a form provided by your account administrator.
- **Real Estate** – Give your property to loved ones and your favorite causes by deed while reserving a life estate. Contact us for a free illustration of the benefits of this plan.

When a beneficiary designation is completed properly, assets simply pass automatically at your death. Call or email us for all the ways you can make modest changes to your plans and benefit the people and causes important to you.



Take a Turn in the Right Direction

Begin your Philanthropic Journey



Would you like to get involved and support our the parishes, schools and ministries of the archdiocese in exciting ways? You may be surprised to discover that there are many options available with gift planning. Let us help you make a turn in the right direction with a plan that's customized for you and your goals, so that giving to the causes you care about becomes possible today.

Charitable Bequest

Having your affairs in order and creating a will is an important step in your life journey. It's your opportunity to plan how you will benefit your family, friends and charitable organizations after your lifetime. Including a gift in your will, often called a bequest, is a great way

to support the future of our Church without giving away any of your assets today. It is also important to note that if your circumstances change, a bequest is a gift that can be changed at any time.

Make Plans for the Road Ahead!

Here are some of the ways you can support our Church with a charitable bequest:

- Make a gift of a specific dollar amount
- Make a gift of a percentage of your estate
- Leave us the remainder of your estate after you have provided for your heirs

Inspire Others with Your Journey

It's never too early in life's journey to think about the future. **Anyone who has property and a family should have an estate plan.** A charitable gift can be an important part of that plan.

Contact an attorney and our office or your parish or school and begin exploring customized gift planning options created just for you and your circumstances. With a little research and some planning, you will be able to leave a legacy that inspires others for years to come.



This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

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Coming to a Parish Near You!

In 2019, nine (9) parishes had a Sunday Mass intention for living and deceased members of the Living Legacy Circle. Legacy Planning Officer, Tony LaMar, attends every Mass and speaks at each one to inform parishioners about this recognition society and promote this type of charitable giving.

The Living Legacy Circle's living and deceased members will be remembered in prayer during the following Masses held throughout the archdiocese:

Scheduled for 2020

Parish	Date
Mary Our Queen - Omaha	April 25/26
St. Philip Neri - Omaha	May 16/17
St. Cecilia Cathedral - Omaha	June 13/14
St. Frances Cabrini - Omaha	July 18/19
Sacred Heart - Omaha	Aug. 15/16
St. Thomas More - Omaha	Sept. 12/13
Our Lady of Lourdes - Omaha	Oct. 31/Nov. 1
St. Joseph - Springfield	Nov. 7/8
St. Wenceslaus-Omaha	Dec. 12/13

In Memoriam

LLC Members Deceased in 2019

Mrs. Rita Starr	4/29/19	St. Bernadette - Bellevue
Mrs. Jean O'Connor	5/6/19	Christ the King - Omaha
Rev. Martin P. Conley	8/6/19	Priest
Mrs. Loreta M. DeMarco	11/12/19	St. Joseph - Springfield
Dr. James R. Dunlap	12/16/19	Christ the King, Omaha

Mass Intention for Deceased LLC Members

When one of our Living Legacy Circle members passes away, the Legacy Planning office contacts their parish and requests a Mass intention for the repose of his or her soul. Below is a list of those Masses that will be said in the future. If you can, please come and pray for those who made the Church a part of their lasting legacy.

LLC Member Mass Intentions

Dr. James Dunlap Sunday, September 20th, 2020
at 10:00 am – Christ the King - Omaha

Legacy Seminars

Since 2018, 18 parishes have hosted seminars or are actively working with the Legacy Planning Office to implement Tony LaMar's seminar guidebook and its easy step-by-step plan. If interested in hosting a seminar at your parish or school contact Tony LaMar using the contact information below.

Upcoming Legacy Planning Seminars

Parish/School	Date	Time
St. Philip Neri/Blessed Sacrament - Omaha	5/17/20	11:30 am

These parishes and schools have hosted Legacy Planning Seminars with the assistance of the Archdiocese of Omaha Stewardship and Development Office:

Parish/School	Date
St. Columbkille - Papillion	9/9/18
Hartington Cedar Catholic High School - Hartington	9/19/18
Ss. Peter & Paul Catholic Church - Bow Valley	10/14/18
St. John the Baptist - Fordyce	11/4/18
St. Patrick - O'Neill	9/9/19
St. Stephen the Martyr - Omaha	10/3/19
St. Frances Cabrini - Omaha	11/7/19
St. Pius/St. Leo - Omaha	1/26/20
St. Bernadette - Bellevue	3/8/20

The Living Legacy Circle



The **Living Legacy Circle** is a special way to recognize individuals who have made provisions in their estate plans for the Archdiocese of Omaha and its parishes, schools and other Catholic ministries. The **Living Legacy Circle** offers a unique opportunity for those who want their giving to transcend their own lifetimes. For information about membership, please call Tony LaMar, Legacy Planning Officer, at 402-557-5650.



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