



Legacies

LIVING LEGACY CIRCLE NEWS

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Faith and Family: Priorities Have Always Been the Focus for Nancy Abboud

Nancy Abboud is an organized person. She isn't one to leave things to chance. Many years ago, when her family was young and her husband, David, traveled frequently, she worried about him and how it would impact her family if he were hurt or became sick. "Something bad could happen and where would we be?" Nancy thought. To alleviate some of her concerns, she made sure that the Omaha couple met with their attorney to set up an estate plan that was right for their family.

Providing for the couple's children was an obvious priority. Providing for Christ the King Church in Omaha—the parish that she loves and has been a part of for most of her life—was also essential. "My faith is very important to me for starters, but Christ the King Parish is a very special place."

David passed away in 2014 but Nancy continues to provide in her estate plan for the people and organizations that mean the most to her. "I believe that if you belong to something and you care about it, then you automatically are inclined to give,"



said Nancy. "Some people give of their time, some give of their talent and some give of their treasure. Some can do all of those things. If you have the means to plan ahead and help an organization or your Church or archdiocese, I would encourage you to prepare in your estate planning for that."

Your legacy tells your life story. It must be carefully cultivated through thought and planning and often starts with creating an estate plan. It can help clarify priorities and decide who and what is truly most important. Many people are called to include the Catholic Church in their estate plans as a lasting testament to their faith. The Archdiocese of Omaha created the Living Legacy Circle as a special way to recognize those who have made a

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provision in their estate plans for the archdiocese or a parish or school within the archdiocese.

A gift from your will or estate accomplishes several key benefits:

- It guarantees that your generosity to the Church will continue even after you are gone
- It provides needed assistance to the parish, school or ministries that are important to you
- It may provide tax benefits for you and your heirs
- Most importantly, it sends a strong message to your heirs that the Church played a prominent role in your life.

Learn more about how your legacy can make a difference here in the Archdiocese of Omaha by contacting:

Tony LaMar
Legacy Planning Officer

Archdiocese of Omaha
Office of Stewardship & Development

402-557-5650
ajlamar@archomaha.org

Have Your Plans Changed?

For almost everyone, the answer to that question is yes.

Things have changed. Our plans have changed. Our lives have been put on hold. Most of us couldn't have anticipated the series of recent events that have so greatly impacted our sense of personal and financial security.

Need Assistance?
We are here to help.

Please know that we are thinking of you during this time. If we can be of help to you and your family, please don't hesitate to reach out.

Archomaha.org/legacy



During times like these, even the best-laid plans may need to be revisited.

If you are like most people, you are thinking about the impact of the current events on your future.

Clients are contacting advisors in record numbers to discuss their needs. If you need help connecting with someone to assist you and your family, please contact your parish or pastors for a recommendation. There may be advisors and estate attorneys who advertise in your bulletin so check there as well.

As always, please let us know if we can be of assistance to you as you think through your plans. We have a variety of resources available online that we can send to you that may be helpful in rethinking your retirement planning, inheritance, planning for your family and ways to create your legacy.

WHAT WILL YOUR LEGACY BE?

Support the Archdiocese of Omaha with a Bequest from Your Estate

While it's impossible to know or control what happens in the future, you can have security about achieving your ultimate goals by making a plan.

Planning is one way to create a secure future for you and your loved ones. With a good plan, you can rest easy knowing that your family will be well cared for and your property will pass to your intended beneficiaries.

How to make a bequest

A bequest is one of the easiest gifts you can make to significantly impact our work. Your estate planning attorney can include a provision in your will that leaves a lasting gift to the Archdiocese of Omaha. Your bequest could be a gift of specific assets (such as a vehicle, artwork or coin collection), a dollar amount (\$1,000, \$10,000 or \$50,000), or a percentage of your estate (3%, 10% or even 25%). A bequest could also be made from the residue of your estate or what is left after all gifts have been made to your heirs.

Beneficiary designation gifts

It's easy to designate beneficiaries for assets that are not transferred through a will. For example, you can designate the Archdiocese of Omaha as a beneficiary of your retirement assets, life insurance policy, bank accounts and investment funds by completing a simple form. Please contact your accountant, agent, or asset administrator to designate the archdiocese as a beneficiary of these assets. Let us know if we can make sure the proper designations are in place so that your plans are carried out according to your wishes.



Bequest Benefits

A **charitable bequest** or **beneficiary designation gift** is an easy way for you to help us in our mission.

Here are some of the benefits:

Your gift costs you nothing today

Your gift is free of federal and estate tax

You can change your mind later

You can still benefit your heirs with specific gifts

You can leave a legacy

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!

The Stewardship & Development office tries to schedule at least 12 Sunday Mass intentions for living and deceased members of the Living Legacy Circle. Legacy Planning Officer, Tony LaMar, attends every Mass that weekend and speaks at each one to inform parishioners about this recognition society and to encourage 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
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

Scheduled for 2021

Parish	Date
St. Margaret Mary	Nov 7/8

In Memoriam

Recently Deceased Living Legacy Circle Members

Rev. Martin P. Conley	8/6/19	Priest
Mr. Rodney Lammers	10/15/19	All Saints-Cedar County
Mrs. Loreta M. DeMarco	11/12/19	St. Joseph - Springfield
Dr. James R. Dunlap	12/16/19	Christ the King, Omaha
Rev. James F. Schwertley	7/8/2020	Priest

Mass Intention for Deceased Living Legacy Circle 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.

Living Legacy Circle Member Mass Intentions

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

Rev. James F. Schwertley Tuesday, August 18th at 11:15 am –
St. Cecilia - 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.

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.



Tony LaMar
Legacy Planning Officer

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Stewardship & Development Office

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