



Fall 2018

# Good Stewards

United in faith, we bring the Reign of the Sacred Heart to the world

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## Better Than He Found It ...

*"The Sacred Heart has been with me throughout my life, in good times and in bad." — Mac*

There is an old scout saying, "Leave where you have been better than how you found it." I believe that saying could be applied to our daily lives. We should leave everything we touch better than we found it. Whether it is a small improvement or one of great magnitude, our world would be a much better place if we all followed this rule.

Consider the case of our friend Mac who has lived his whole life helping others. During WWII he encountered combat in Europe and found his 'true strength.' "The Sacred Heart has been with me throughout my life, in good times and in bad," shared Mac.

One of those dark times was the death of his wife Anna. Mac had taken care of her for many years after she had multiple strokes. But, in spite of being Anna's caretaker and working full time in sales, Mac found time to help those in need in his parish and supported many charities locally and abroad. He found great joy visiting the charities he had helped and seeing how his hard-earned gifts made a difference.

While some might wonder,

"How much can one man do?" Mac believes, "Plenty!" He has spent much of his time traveling the world, donating his time, talents and resources to make it a better place. In doing so, Mac hopes he has left an impression on others that **we all** have a similar responsibility.

Mac made the decision to remember the Priests of the Sacred Heart in his estate plans so his desire to help others will continue for years to come.



## Extend your generosity beyond your lifetime.

When naming charitable beneficiaries in your plans, make certain your attorney uses the correct legal name of the intended recipients in order to avoid confusion and unnecessary delays.

**Our legal name is:**  
**Priests of the Sacred Heart**  
**Sacred Heart Monastery**  
PO Box 367  
Hales Corners, WI 53130



*Fr. Sendeke Zenon, SCJ (Superior in the Congo), Fr. Paul Kelly, SCJ and Fr. Dominic Peluse, SCJ visit with Mac.*

If you, too, would like to help leave this world a better place through your legacy gift use the enclosed reply form to request information or contact Pam Milczarski at 1-866-268-0157 or by email at [pmilczarski@poshusa.org](mailto:pmilczarski@poshusa.org). To learn more about the Priests of the Sacred Heart visit our website [poshusa.org](http://poshusa.org).



## Lasting Legacy

A little boy was kneeling at his bed praying. "Dear God, please bless mommy and daddy. Please bless my little brother and big sister". Then in a loud voice prayed, "Dear God please do not forget to bring me a new bike for my birthday". His mother asked, "Why are you shouting, God isn't hard of hearing." The boy answered, "I know, but Grandma is!"

The little boy knew Grandma loved him and would gladly share. What he didn't realize was the joy his grandma received in giving.

At this time of year, it is in giving that we receive. A lasting legacy helps people remember what was important in their time on earth. The little boy in the story knew grandma so enjoyed sharing gifts with him. What will your legacy be?

### **Good Stewards**

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## Donor Advised Fund

Use this tax-wise fund to benefit the Priests of the Sacred Heart

Donor Advised Funds, a one-stop solution to simplify your charitable giving, have experienced a recent surge in popularity. Here is how you can turn these funds into a legacy for the ministry of the Priests of the Sacred Heart.

### Establish the fund

1. Create the fund to manage your charitable contributions
2. Contribute to your fund
3. Qualify for a tax deduction for the current tax year if you itemize
4. Decide now or later which charities you wish to support
5. Grow your fund through the investments made with your contribution
6. Advise\* your fund administrator which charities should receive your support, including the Priests of the Sacred Heart

*\*You cannot direct distributions — you can only recommend distributions. The fund administrator has an obligation to deny grants that do not meet criteria established by law.*

### Create Your Legacy

Turn your Donor Advised Fund into a legacy by naming the Priests of the Sacred Heart as a beneficiary. You can do this at the time you create the fund, or if you already have a Donor Advised Fund, simply contact your fund administrator to complete a beneficiary change form. You have the option of naming the mission of the Priests of the Sacred Heart as the sole beneficiary or to receive a percentage of the fund. If you chose a percentage, the remaining amount can be managed by your loved ones.

If you have questions please contact Pam Milczarski at 1-866-268-0157, by email at [pmilczarski@poshusa.org](mailto:pmilczarski@poshusa.org) or visit our website, [poshgift.org](http://poshgift.org).

## Live by Example

Throughout his 45 years of marriage, George was a devoted and loving husband and father. He and his wife, Catherine, were blessed to have eight wonderful children, one daughter and seven sons. Catherine has now gone to her eternal reward, and George finds himself very busy with their children, grandchildren and great grandchildren. Yet, he still finds time for volunteer activities, including helping the Red Cross and St. Vincent de Paul, driving the elderly and veterans to appointments.

George and Catherine, have been long-time friends of the Priests of the Sacred Heart and felt driven to support our mission. They spent time working with an estate planner to put their financial affairs in order. George feels leaving gifts to the charities closest to their hearts through their estate will serve as an example for their descendants.

Humbled by the generosity of George

and many other benefactors, the Priests of the Sacred Heart has established the Good Steward Society to recognize donors who have made a commitment to assist our priests and brothers through a remembrance in their estate plan.

If you would like more information about how you can support the Priests of the Sacred Heart through a bequest, please contact Pam at 1-866-268-1057 or email [pmilczarski@poshjusa.org](mailto:pmilczarski@poshjusa.org).

When deciding how to distribute your estate, please first consider your family members and loved ones who may need your support. Then, remember the Priests of the Sacred Heart and their mission work in the US and 40 countries around the world.

*\*As with any major financial decision, we suggest you contact your attorney, accountant or financial planner for advice specific to your situation.*

*Fr. Paul Kelly, SCJ thanks George for remembering the Priests of the Sacred Heart in his estate.*



## Your Footprints

Everyone leaves footprints on the sands of time. Thoughtful estate planning is one way to make 'a footprint in the sand' to help others recall our priorities. For example, consider the effect of your estate plan that provides for loved ones and also supports charitable organizations such as the Priests of the Sacred Heart.

### **An estate gift makes a positive statement.**

When you include the Priests of the Sacred Heart in your estate, you declare to your family and friends you believe in and care about the Priests of the Sacred Heart mission. Your estate gift becomes a clear declaration of your values.

### **An estate gift provides needed funding.**

Estate gifts are especially valuable, not only because they tend to be larger than annual gifts, but also because they often come at critical

times. An estate gift provides an extra boost to our budget that can make the difference between program progression and program cutback.

Designate an estate gift for a specific purpose or leave it unrestricted to use where needed most. They can also fund endowments which perpetually provide an ongoing witness to your friends and loved ones about the mission work of the Priests of the Sacred Heart.

### **An estate gift encourages imitation.**

There's something about a well-planned estate gift that influences others to "go and do likewise." As friends and family members plan their own estates, they may recall your generosity and thoughtfulness. Your gift may unlock resources from other estates for the Priests of the Sacred Heart.

## How can we help you?

Would you like to learn how much annual income you would receive from a Sacred Heart Charitable Gift Annuity? Simply check the box on the enclosed reply form to receive the income amount, tax-free portion and the charitable deduction you would receive. If you have questions please contact Pam Milczarski at 1-866-268-0157 or by email at [pmilczarski@poshusa.org](mailto:pmilczarski@poshusa.org).

# Have You Planned Ahead

## Is your estate plan in need of a checkup?

If we were sitting together right now and I asked, “*What’s important to you in your life?*” how would you answer?

You’d probably start with your family and other loved ones. Then you’d consider those things important to your soul: your values, your faith in God, the loving grace of Jesus Christ and maybe your vision of a world united in peace under the reign of His Sacred Heart.

**There’s a way you can make a statement about what’s important to you in your life – a lasting statement that stands strong even after you have left this earth: *your Will*.**

Perhaps, like many people, you are uncomfortable even thinking about your Will or dealing with matters of estate planning because you don’t like to think about your passing.

*Preparing your Will is about your life.* Your estate plan is a proclamation of what is important to you. It is about leaving a legacy; it’s about your own immortality.

**Your Will is essentially a declaration of what’s in your heart. It should not be something to fear.**

Doctors recommend that we have an annual check-up but did you know your Will may also need a check-up?

Here are a few questions you may want to ask yourself regarding your estate and financial plans.

## Answer each question Yes or No.

- | Yes                      | No                       |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Do I have a Will?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Have I recently moved?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Has my marital status changed?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do I know my property will go to those who I wish to receive it?                |
| <input type="checkbox"/> | <input type="checkbox"/> | Have family, friends and my favorite charities been selected?                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Have new members of my family been taken into consideration?                    |
| <input type="checkbox"/> | <input type="checkbox"/> | Do I need to change the person I’ve chosen to handle my estate?                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Have I discussed my plans with those closest to me?                             |
| <input type="checkbox"/> | <input type="checkbox"/> | Have I named beneficiaries for insurance policies and retirement plans?         |
| <input type="checkbox"/> | <input type="checkbox"/> | I have an inventory of all my assets?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are my financial records up-to-date and readily available?                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Am I satisfied with the charitable gifts I have provided for in my estate plan? |

If you have checked at least one box *No*, you may want to review your estate plan.

The Priests of the Sacred Heart have a *free, no obligation* Estate Planning Kit to help walk you

*Continued on page 6*



**Will you ...**



### ... remember the children of Congo in your Will?

through the basics. Being fully prepared when you meet with your attorney will save valuable time *and* money.

If you would like to receive this information, please complete the enclosed reply form and return in the envelope provided. Or, you may contact Pam Milczarski at 1-866-268-0157, or

by email at [pmilczarski@poshsua.org](mailto:pmilczarski@poshsua.org). Visit our website, [poshgift.org](http://poshgift.org), for helpful videos, an Online Will Planner and a downloadable version of our guide.

**As you make your estate plans, I prayerfully ask you to consider a bequest to the Priests of the Sacred Heart.** It is a beautiful demonstration of your faith and values as you enable our ongoing work to bring about God's kingdom on earth. In this way, you create a legacy in your name that lives beyond the life God has lovingly provided.

By making a gift through your Will, you'll become a partner with the Priests of the Sacred Heart, and eligible for membership in our Good Steward Society. *Any gift, no matter how small, has the power to make a tremendous difference in the life of someone in need.*

*Will you extend your generosity beyond your lifetime?*

*\*This information is not professional tax or legal advice; consult a tax advisor about your specific situation.*

## Your donation makes our work possible ...

Please join our monthly giving program.

Your monthly donation empowers our mission to spread the profound love Jesus has for all people through prayer, service and action. As part of the Heart to Heart Society, you will be part of our work in the United States and around the world to:

- Feed the hungry, comfort the sick and share God's love
- Educate and house seminarians studying for the priesthood

- Ensure Catholic education for thousands of children here and abroad
- Provide a secure home and healthcare for retired priests and brothers

Our beloved Heart to Heart Society members provide a foundation of monthly support allowing our priests to serve Christ and the most vulnerable among God's children.

Please join today by calling our toll-free number, 1-866-268-0157.

