



HERITAGE NEWSLETTER

A semiannual publication of the Catholic Diocese of Arlington

SPRING 2017



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The Joy of Giving from the Heart

Mr. and Mrs. Bill Ratliff have been parishioners at St. Timothy's Parish in Chantilly for more than 25 years. They love celebrating their faith, and participate in several ministries close to their home and heart.

Looking for a worthy investment, Bill and Trudee established charitable gift annuities paying them lifetime income until their deaths, at which point, the parish will receive the remainder. This approach is much more appealing and gratifying for the Ratliff's rather than simply leaving income in a low interest account.

Trudee recently stated, *"The gift annuities were simple to create. I just called the Diocese and requested the application papers, completed them and mailed them back. We then had a guaranteed, fixed income stream that began shortly thereafter."*

Every year a 1099 form is mailed to Bill and Trudee for tax purposes. When establishing a CGA, *donor (s) can choose to receive their income by mail or direct deposit.*

They have derived so much joy from St. Timothy's and are happy their CGA will leave money to help the parish endure and thrive so future parishioners can celebrate and participate in their Catholic faith.

Both Bill and Trudee stated that they believe if you love your faith, you may want to establish a CGA or another gift to benefit your parish or a Diocesan program of your choice. They are glad they did.

Charitable gift annuities are irrevocable. If you fund a CGA with cash or appreciated stock, you will receive a charitable deduction, fixed, guaranteed income for life based solely on your date of birth. The older you are, the higher the payout rate. If you fund a CGA with appreciated stock, you will pay reduced capital gains tax.

Sample Annuity Rates

<i>Age</i>	<i>Rate</i>
70	5.1%
75	5.8%
80	6.8%
85	7.8%

To request a charitable gift annuity calculation, please contact Gretchen Koch at (703) 841-3819 or g.koch@arlingtondiocese.org.

The Benefits of Planned Giving: A Pastor's Perspective

Very Rev. Patrick L. Posey

Pastor, St. James Parish

Celebrating its 125th anniversary, Saint James Parish has benefitted from many bequests made on her behalf. I know that I can speak for all pastors in acknowledging their profound gratitude to families who have very graciously named their parish in their will or trust plans. Including one's parish in their estate planning is a testament of faith: *a faith experienced during one's life and a belief in the future good that can come from this expression.*

Since I arrived at St. James, we have received several bequests in a wide range of amounts. We have increased our Guardian Angel Scholarship Fund with a five-figure gift, increased our service to the needy by expanding our monthly Food Distribution to twelve months from ten, and strengthened our support within the Falls

Church community by providing increased funding to their winter shelter and the Falls Church Community Services Board.

Our largest bequest was used to establish an Operating Reserve, allowing for greater financial stability to our parish. This bequest also provided a safety net against unforeseen expenditures, which can occur in a Church of our age, giving us the financial discretion to invest in programs and areas vital to health not only of our parish and school, but our Church in the world through increased evangelization efforts.

As we have benefitted from those who have come before us, I know that future generations will do the same in offering support when they pass on to be with the Lord.



How my Faith Became my Profession



Growing up Catholic, my mother reminded me daily *"in so far as you did this to one of the least of these brothers of mine, you did it to me"* (Matt. 25:40, NJB). I witnessed this edict by the actions of my mother. Philanthropy and volunteerism were learned early and practiced often.

Our early volunteerism revolved around the activities for the disabled, especially the Special Olympics (my only brother has Down Syndrome). Advocacy meetings, telethons and special education events were always attended.

Our family also raised money and delivered food, clothing, Thanksgiving baskets and Christmas gifts for the poor. When my mom discovered a need, our family reached out.

My career in development began by chance. I answered an ad for a planned giving representative in

the newspaper. The term planned giving was unknown to me, but I had every attribute listed in the job description. I was hired and hence began a career that has now spanned over 20 years.

I have worked for St. Jude Children's Research Hospital, followed by several years with the Archdiocese of Washington, then moving onto their Catholic Charities office, in helping individuals and families plan a gift from their estate.

As Catholics, we want to express our gratitude and faith for our lives and abundance. I welcome the opportunity to share how simple it can be to invest in our spirituality by leaving a legacy to the Diocese, your parish, our schools or Catholic Charities.

I look forward to meeting many of you soon.

Gretchen Koch
Director of Planned Giving
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(703) 841-3819
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The Path to the Priesthood

Christopher Tipton

Theology III, St. Charles Borromeo Seminary, Holy Spirit Parish

What did you do prior to entering seminary?

I attended and graduated from Christendom College with a degree in Philosophy and Theology in May 2012. During the summers, I would work as a lifeguard and a swim instructor.

What influenced your decision to apply for seminary entrance?

God planted a desire to become a priest at an early age, which I fostered for many years. As I grew older and began to understand the priesthood more, my desire also grew, and I began to ask God to make it clear to me when I should apply to the seminary and take that next step in discernment. Through prayer, it seemed God was calling me to begin my application once I had finished college.

Why do you want to be a priest?

For as long as I can remember, I have always wanted to be a priest. I want to serve God by serving His people and His Church in the priesthood.

What are your favorite pastimes?

I enjoy reading books, painting, drawing, playing sports, swimming, and good discussions with friends.

What is your favorite quote?

“Our hearts are restless until they rest in thee.”
– St. Augustine of Hippo

Who is your favorite Saint and why?

Tough question. If I had to pick, I would probably choose St. John Marie Vianney and St. Augustine because of their

influence and guidance in my life. Their lives, teachings, and wisdom have always inspired me to delve more deeply into my faith to recognize its simplicity, its beauty, and its truth.

What advice would you give to a young man thinking about the seminary?

I am blessed to have many holy men aid me in my discernment, and I would reiterate what they have told me. God uses our desires to draw us closer toward Him. If you have a desire to pursue the priesthood, go for it. God will make His plan for you clear. Fr. Bashista says this beautifully when he says, **“Get on the train; if it is not taking you where you are meant to go, you can get off on the next stop.”** If you involve God in your discernment, you cannot go wrong.



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- Enclosed is a gift for the Seminarian Education Endowment Fund (SEEF)

Start your Estate Plan By Requesting these helpful resources...

- A Catholic Estate and Personal Planning Workbook
- A Catholic Advance Medical Directives Booklet
- A free, no-obligation proposal of the benefits of creating a Charitable Gift Annuity
My/our date(s) of birth : _____ / _____ (suggested age: 65 & older)
- I have already made a provision in my estate plans for a bequest to my parish and/or the diocese and would like information about membership in the Catholic Heritage Circle.***
- I am considering a bequest to my parish and/or diocese and request approved text
- Information on establishing a Donor Advised Fund within *The Foundation for the Catholic Diocese of Arlington*



(Please see other side)

Feel Empowered.

*Make a difference in 3
simple steps:*

If you have an insurance policy, retirement plan, or brokerage account, call your plan administrator. Next, request a change of beneficiary form, fill in your parish name, or SEEF, or the Diocese, along with other pertinent information. Then mail the form back to the administrator. That's it! You have just included a legacy to the Church, from which all good comes.

Thank you!



*The Seminarian Education Endowment Fund (SEEF)
SEEF surpasses \$1 million*

To support the future of the priesthood,
please make check payable to:

Foundation for the CDA

(include SEEF on memo line)

and mail to:

The Catholic Diocese of Arlington
200 N. Glebe Road, Suite 811
Arlington, VA 22203

or use the enclosed envelope.

Thank you.

Save the Date:

2017 Annual CHC Dinner

Friday, October 27
De Sales Hall
Our Lady of Good Counsel
Vienna, VA

*Questions regarding Planned Giving,
contact Gretchen Koch.*



*Gretchen Koch
Director of Planned Giving
Diocese of Arlington
(703) 841-3819
g.koch@arlingtondiocese.org*

*Please tear off and return in the enclosed envelope. (Spring 2017)
(Please see other side)*

Please contact me (us) via email. The email address is: _____

Please contact me (us) by phone at: _____

Name _____

Mailing Address _____

City _____ State _____ Zip _____

Mail this form to: The Catholic Diocese of Arlington, 200 N. Glebe Rd., Suite 811, Arlington, VA 22203