

the standard is...  
tradition. integrity. compassion. leadership.  
faith. brotherhood. trust. sanctuary.



As we approach the end of the year and the upcoming tax season, we wanted to remind you of the opportunities available to support CHS while optimizing your financial plans. Your charitable giving can make a profound impact on our school, and there are a variety of ways to give that also provide significant tax benefits. The current estate tax exemption is set to expire January 1, 2026. Unless Congress acts before this date the exemptions will revert to where they were in 2017.

Several options to consider, include:

- **IRA Distributions:** If you are 70½ or older, you can make a tax-free gift directly from your Individual Retirement Account (IRA) to CHS. This charitable distribution counts toward your required minimum distribution (RMD) and reduces your taxable income. Although the age for RMDs has increased to 72, you can still make a Qualified Charitable Distribution (QCD) starting at age 70½. The maximum amount for a QCD is \$100,000 per person per year.
- **Stocks, Securities and Real Estate:** Donating appreciated stocks, securities, or real estate can be a tax-efficient way to support CHS. If you itemize deductions, you may receive a charitable deduction for the fair market value of the assets while avoiding capital gains taxes on the increased value of those shares over the years. Thus, if you purchased a stock for \$25 and donated the shares directly to CHS when valued at \$60, you are considered to have made charitable contribution of \$60 and do not pay capital gains on the \$35 appreciated value.
- **Donor-Advised Funds:** Establishing a donor-advised fund allows you to make a tax-deductible contribution to the fund and recommend grants to CHS over time.
- **Life Insurance:** Naming CHS as a beneficiary or transferring ownership of a life insurance policy qualifies as a charitable deduction for the cash surrender value or premiums paid.

## catholic high school office of advancement

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- **Will Bequests:** Including CHS in your will or trust is a meaningful way to leave a legacy. This planned gift can reduce estate taxes and ensure future support for our school.
- **Charitable Remainder Trusts:** Establishing a trust provides you with an income stream while benefiting CHS. You receive a tax deduction, and the remainder supports our mission.
- **Employer Match:** Explore whether your employer participates in a matching charitable gift program, effortlessly doubling or even tripling the value of your donation.

Catholic High School is dedicated to facilitating a giving process that aligns with your philanthropic interests. We strongly encourage seeking advice from your tax professional to maximize the charitable aspirations. If I can help in any way, please don't hesitate to contact me at (225) 362-3255 or via email at [jkelly@catholichigh.org](mailto:jkelly@catholichigh.org).

Your support is critical in shaping the future of our school and the lives of our students. Thank you for considering CHS in your year-end giving and tax planning. Together, we can continue the tradition of excellence.

[SUPPORT CHS - Catholic High School](https://www.catholichigh.org/support)



MAKE YOUR GIFT TODAY AT  
[CATHOLICHIGH.ORG/GIVE](https://www.catholichigh.org/give)

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