

Cor Jesu forms future leaders through a strong Catholic, college-preparatory education, made possible by the generosity of those who believe in our mission.

Through planned giving, you can help secure Cor Jesu's future by strengthening our endowment and sustaining our impact for generations of Chargers to come.



Blessed Clelia Legacy Society

By documenting a planned gift to Cor Jesu, or letting us know you have already included Cor Jesu in your plans, you become part of the Blessed Clelia Legacy Society. This society honors alumnae, parents and friends who are committed to sustaining Cor Jesu's mission for future generations.

Members of the Blessed Clelia Legacy Society are recognized in meaningful ways, including:

- ♥ An invitation to and recognition at the annual President's Reception, celebrating your impact and dedication
- ♥ Recognition in Cor Jesu's annual Impact Report, honoring your legacy amongst our most generous supporters
- ♥ A special Blessed Clelia Society pin, for you to wear to celebrate your membership and commitment to our institution
- ♥ Physical recognition in our school through a plaque or donor wall
- ♥ Complimentary tickets to the annual Christmas Choir concert

Types of Planned Gifts

There are several simple and flexible ways to include Cor Jesu in your long-term plans, many of which can be arranged without changing your current financial situation.

1

BEQUESTS

Support Cor Jesu through a bequest from your will or trust. This allows you to support Cor Jesu's mission without affecting your assets during your lifetime.

2

RETIREMENT PLANS

There are two primary options for leveraging retirement plans for a gift to Cor Jesu:

1. **Make Cor Jesu a beneficiary of your retirement plan.** Your heirs will avoid income and estate taxes, and you can continue to withdraw from your retirement plan during your lifetime.
2. **Make a gift directly from your IRA** (age restrictions apply). If you're 70 ½ or older and own an IRA, you can transfer up to \$100,000 each year to non-profits, including Cor Jesu.

3

LIFE INSURANCE PLAN

Name Cor Jesu as a policy beneficiary or the owner and beneficiary. This is a simple way to give that may provide tax benefits.

4

DONOR-ADVISED FUNDS (DAF)

You can recommend grants to Cor Jesu through your DAF throughout your lifetime. You can also name a non-profit such as Cor Jesu as the beneficiary of any remaining funds in your DAF after your passing.



* We encourage you to consult with your financial or legal advisor to determine the option that best fits your goals. Cor Jesu is also available to discuss planned giving opportunities confidentially and without obligation.



For questions or more information,
please contact:

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