St. Pius X - St. Matthias Academy

Legacy Society

A guide to planned giving.









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Why Give?

"The great use of life is to spend it for something that will outlast it."
— William James

At St. Pius X - St. Matthias Academy, we have witnessed the countless ways in which individuals have changed the lives of our students with their generosity upon their passing. Your gift will become a part of the story of this school, ensuring our continued ability to positively affect the lives of young people.

We hope you will consider continuing to support St. Pius X - St. Matthias Academy's Mission to provide a challenging Catholic college preparatory education in a supportive learning community that will positively affect the lives of teenagers, and provide opportunities for all students to grow in faith, learn without limits, and live with a purpose.

The school recently honored a host of special anniversaries, having celebrated over a decade since its rededication, 60 years since St. Matthias High School graduated its first class of seniors, and 70 years since Pius X High School was founded. This institution has stood the test of time and built upon its legacy to become one of the fastest-growing Catholic High Schools in California.

Shifting from a focus on survival and growth to sustainability and continued excellence, the school is well-positioned to fine-tune its programming and delve deeper into the specific needs of each individual student academically. Your gift not only preserves the legacy of this institution but also primes PMA to be an innovative school, offering the best opportunities possible to the community we serve.



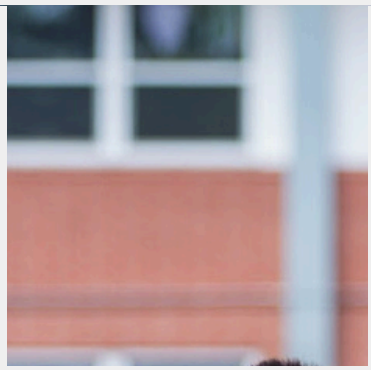
Greatest Needs

How Your Gift Makes a Difference

Planned gifts secure the future of St. Pius X - St. Matthias Academy. Your investment will be remembered for decades to come and ensures that PMA not only survives but thrives as the co-ed Catholic school of choice in the Los Angeles Area.

A planned gift made to St. Pius X - St. Matthias Academy, like most other gifts, may be restricted or unrestricted. Unrestricted bequests allow PMA to focus on funding the needs at the discretion of the school's leadership. Restricted bequests focus your gift's impact on a specific designated area. We encourage you to consider your restricted bequest on PMA's greatest needs: tuition assistance for dedicated and proactive students who require support in seeking a Catholic Education, paying educators fair and competitive salaries, offering transformative programming where students can explore their talents, or updating our beloved campus to meet the needs of our growing student body.

Restricted or Unrestricted options



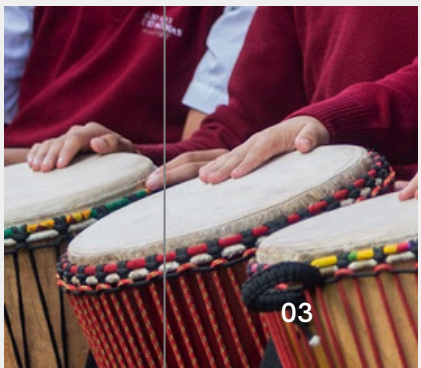








Transformative Programming





General Scholarship Fund

Accessibility and affordability are paramount to PMA's continued success. Enrollment has increased by nearly 50% since 2021. With 610 students in 2025, PMA is quickly becoming the destination for purpose-driven students who seek a quality education. At PMA, tuition is among the lowest in both LA and Orange County. As PMA continues to grow and offer increasingly higher-quality and transformative programming, it commits to maintaining accessibility for families regardless of income level. Currently, 79% of PMA students come from families whose annual gross income is designated as low-income by CA State standards. PMA goes to great lengths to ensure that a PMA education is available to any student committed to growing in faith, learning without limits, and living with a purpose. 91% of PMA students receive tuition assistance or scholarships to attend PMA, resulting in over $3 million allocated in tuition assistance and scholarships annually. A gift to PMA is magnified by its results, as over 90% of PMA students matriculate directly to a college or university upon graduation. Among PMA's recent graduates are Posse and Gates Scholars, future doctors and nurses, lawyers, engineers, NBA hopefuls, talented musicians, artists, and athletes, future educators, and many more. It is important that the decision we make today ensures, in the midst of change and growth, that all PMA students will continue to belong on our campus and learn without limits.

Enrollent Increase
50% since 2021





79% of PMA students come from families whose annual gross income is designated as low-income





Workforce/ Human Capital Fund

Teachers consistently earn less than other college-educated professionals and report at almost double the rate of other working professionals to have higher stress and burnout. PMA has led in addressing this national trend by increasing average teacher salaries, benefits, and quality of work since returning to full-time in-person instruction post COVID-19. In the 2025-2026 school year, PMA celebrated an 85% staff retention rate compared to the 2021-2022 school year rate of below 50%. Although growth has been achieved, PMA continues to lose talented staff members to higher-paying comparable roles in public, charter, and private schools. To sustain the retention rate for years to come, PMA must continue to increase salaries and benefits to compete with its counterparts and continue to innovate. When educators stay, students thrive academically, spiritually, socially, and athletically. Staff retention increases student achievement, builds a stronger school culture, increases alumni engagement, and creates more time to focus on growth rather than hiring. Retention is not just an HR metric; it's a ministry strategy and a competitive advantage. Stability builds legacy. Legacy builds loyalty. Loyalty builds mission sustainability.

Program Fund

One of the most critical questions for teenagers today is “What is my purpose?” At PMA, we define purpose as where one’s talents meet the world’s needs. Centered in this definition and our mission to provide all students opportunities to grow in faith, learn without limits, and live with a purpose, all programming is designed with this end in mind. From freshmen biology, to the baseball team to the spring musical, students explore a diverse range of programming to expose them to new skills, develop talents and passions, and journey closer to determining their purpose. Recently, PMA transitioned to the 4x4 university block schedule. This structural change to the school has increased the amount of coursework students take from 12 to 16 credits per year. This change has been the catalyst for almost 30 new courses being added to the program of study, diversifying students' opportunities to engage in dual enrollment, electives, advanced placement, and co-curricular coursework. The increase in exposure to a wide variety of coursework has positioned PMA programming to be comprehensive and transformative across academics, athletics, the arts, faith & leadership formation, and career & technical education. This has prompted initiatives for programming that will need initial investments and sustained funding to support high-quality learning.







Campus Moderinization

PMA's campus has undergone several important enhancements since its rededication in 2013. These enhancements have made the physical campus current and relevant. Recent growth in enrollment and programming has created new demands on the facility that, if met, will complete PMA's physical evolution into a comprehensive co-educational Catholic school. Recent assessments of the school's programming needs for the arts, athletics, and student life efforts revealed a plethora of campus enhancement needs. These enhancements would increase equity between male and female athletic programming, provide dedicated learning spaces for growing programs, and include the following: increased gymnasium capacity, girls and boys locker rooms with room for 2 seasons per team respectively, a weight room with a 50 person capacity, an instrumental music space with storage for equipment, increased storage space for the maintenance work room, a training room with 4 treatment chairs, centralized athletics offices, a coaching classroom for team meetings and film reviews, and storage for all athletic teams. When the list was shared with the architect who completed our recent northwest campus redevelopment, we were given the attached blueprint and renderings, creating a vision for a completely upgraded northeast campus redevelopment.

Tax Benefits of Giving

In addition to supporting the mission of St. Pius X - St. Matthias Academy, a planned gift can provide substantial tax advantages, especially on gifts of stocks and real estate. The total income, estate, and capital gains tax savings, and the probate expense savings can often come close to the amount transferred. Benefits include: an income tax deduction, reduced capital gains taxes, reduced probate costs and estate taxes, and income for life.



How to Join the Legacy Society

Established in 2025, the St. Pius X - St. Matthias Academy Legacy Society recognizes the generosity of our friends and family who have included us in their wills, trusts, or other forms of planned giving that do not affect their existing financial resources, but will have a significant impact on the school for years to come. This is an opportunity to give to an institution you care about while maintaining control and flexibility.

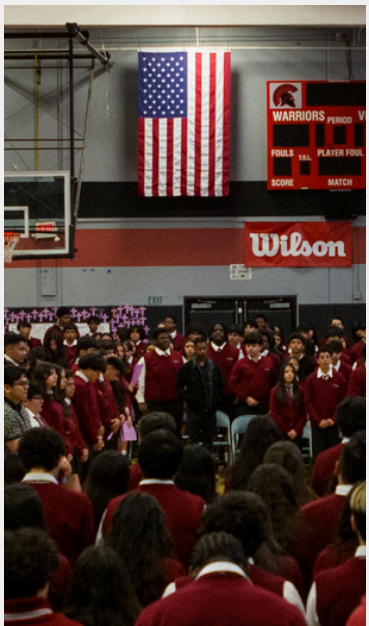
Your gift, combined with the gifts of so many others, reaffirms your belief in PMA now and for the future.

If you are interested in making a planned gift please contact our president, Christian De Larkin by phone or email to explore options and next steps.
Email cdelarkin@piusmatthias.org | Phone (562) 861-2271 x 1012

Membership

As a member of the Legacy Society at St. Pius X - St. Matthias Academy, you will be recognized in our Annual Report, a legacy brick set in Senior Square will be dedicated in your name, and you will be invited to various school events throughout the year. You will also be invited to meet regularly with the school's president to review the status of your fund and the state of the school.









Legacy Society Members

Patricia Rausch

Our first Legacy Society Member is Patricia L. Rausch, who generously left a scholarship to St. Pius X - St. Matthias Academy that honors one student from every grade. When Miss Rausch was a teenager, Pius X High School hadn't yet been built, and she attended St. Anthony High School. However, the school was soon completed in time for 7 of her 10 siblings to be able to attend Pius X High School- so we call her an Honorary Warrior!

Miss Rausch taught 7th and 8th grade at Our Lady of the Rosary Catholic School in Paramount for 51 years. During those years, she was a teacher to over 2,500 students and for many would remain a mentor throughout their lives. She fully lived and believed in the value of Catholic education and pushed every student, no matter their background, to draw close to their faith and to pursue their dreams through continued education.

Shortly after the Lord took her home in March of 2022, the Rausch family donated $100,000 from Miss Rausch's estate to establish the Patricia L. Rausch Memorial Scholarship. This scholarship was awarded for the first time in June 2023 to an incoming PMA freshman upon graduation from Our Lady of the Rosary Catholic School and has been awarded every year since. This very special scholarship will continue for many years thanks to the generosity of a remarkable lady and her wonderful family.

St. Pius X - St. Matthias Academy is grateful to the Catholic Community Foundation for managing the Patricia L. Rausch Scholarship Fund (learn more about this on page 13)

Class of 1962 Can Do

The Class of 1962 has emerged as a philanthropic leader among our alumni generations. At their 50th reunion in 2012, the class was inspired by Randy Martin '62, who challenged the class to do their part in funding future Warriors' education. This was the inception of the 62 Can Do Scholarship. Randy Martin and Cathy Riley '62 have been leading the effort since 2014, raising funds to support a $1,500 scholarship for one student per grade level, totalling $6,000 per year. The scholarship has made PMA a possibility for over 12 scholars since its inception.

In 2025, the Class of '62 began investing in the perpetuity of the 62 Can Do Scholarship to ensure its longevity for generations to come. By, spring of 2026, they raised enough principal balance to join the legacy society and created a permanently designated fund that generates enough interest to support the scholarship.

How You Can Give

Find the Best Gift

Deciding on the right gift for St. Pius X - St. Matthias Academy can be difficult. Take a moment to think about your most important personal and family goals. These could range from maximizing tax benefits and producing income to preserving assets for your heirs.

Estate Planning

While estate planning can entail difficult choices, once your plan is in place, it provides you and your family with a sense of relief and peace of mind. Estate planning is the process of caring for yourself and your assets while you are living and planning for the orderly transfer of assets to other persons and organizations- both during your life and afterwards.

Benefits of Estate Planning

- Ensure the wealth you have accumulated over your lifetime goes exactly where you want to go and when. If you don't have a will or living trust, then the state will impose a distribution plan for you, which may not match your wishes
- Give directions to be followed in case you become incapacitated and cannot make decisions for yourself
- Organize your affairs and designate who will handle them when you are gone
- Appoint a guardian for any minor-aged children
- Provide for any loved ones with special needs in your care
- Minimize possible estate taxes and probate fees
- Specify your funeral arrangements
- Remember and provide for your friends, pets, and organizations you care about but are not included in the default State distribution scheme

Key elements of an estate plan include: a will, a revocable living trust, beneficiary designations, power of attorney for financial matters, power of attorney for health care decisions, physicians' orders for life-sustaining treatment, etc.



Retirement Planning

It's never too early - or too late - to plan for retirement. A few tips to consider as you prepare for retirement:

- Determine how you would like to spend your years
- Reflect on your desired lifestyle during your retirement years
- Save as much as you reasonably can and invest appropriately
- To the extent possible, maximize the financial resources you can draw upon in retirement
- Do not overlook the many ways you can support St. Pius X - St. Matthias Academy, that will result in retirement cash flow

Bequests

A charitable gift from your estate is a favored method of giving that enables you to achieve your financial goals and benefit St. Pius X - St. Matthias Academy. No other planned gift is as simple to make or as easy to change should you ever need the assets during your lifetime.

A bequest may be right for you if:

- You want to make a gift to St. Pius X - St. Matthias Academy
- You want the flexibility to change your mind
- You want continued access to your wealth, should you need it
- You are concerned about outliving your resources

Beneficiary Designation

A beneficiary is one of the simplest ways to make a gift to St. Pius X - St. Matthias Academy. You may specify the individuals and charities you want to support, and you can also specify the percentage of the assets you want each beneficiary to receive. Beneficiary designations are available when giving the following assets:

- Retirement assets
- Life insurance
- Other assets: commercial annuity, bank accounts, investment accounts



Retained Life Estates

Your home is one of your most valuable assets. With a retained life estate, you can give your home to us now, but continue to live in it for as long as you wish. A retained life estate may be right for you if: you want to continue to live in your home, you do not plan to pass on your home to family or other heirs, you itemize your income tax deductions, and you want to save on income taxes now.

A retained life estate is an irrevocable arrangement between you and St. Pius X - St. Matthias Academy. You deed your home to us in exchange for an agreement that gives you the right to live in your home for as long as you choose, even for the rest of your life. When your retained life estate arrangement ends, your home becomes the school's property to use or sell. More than likely, the school would sell your home and use the proceeds to benefit our Warriors.
In Partnership with The Catholic Community Foundation of Los Angeles…

The Catholic Community Foundation of Los Angeles (CCF-LA) is an independent California 501(c)(3) nonprofit charitable religious corporation guided by the values of the Catholic faith.
For individuals and families, CCF-LA creates and manages funds, ensuring that the gifting process is tied to the donor's intent and that all reporting is completed in strict compliance with state and federal laws and tax provisions. They offer a range of planned-giving strategies that empower clients with solutions to maximize their philanthropic impact and tax situation while benefiting those causes dearest to them.

When you make a planned gift to St. Pius X - St. Matthias Academy, it will be stewarded by CCF-LA to ensure that it is positioned to grow and maximize your gift's impact on the school.



Partnership with CCF-LA

Managing your investment through CCF-LA ensures that your assets are protected and will continue to impact the school for as long as it is in existence. Below are some examples of language you can give to your financial advisor to set up a planned gift:

Sample Language to Include in a Will to Create or Be Added to a Donor-Advised Fund (DAF):
I do hereby give and bequeath the sum of (insert dollar amount or percentage) of the rest, residue, and remainder of my estate to the Catholic Community Foundation of Los Angeles (the "Foundation"), a California not-for-profit charitable corporation, to create or be added to the (insert fund name) Donor-Advised Fund to hold, manage, invest, and reinvest the same, collect the income therefrom, and make disbursements to such charities in compliance with the conditions in the DAF Instrument of Gift and the policies of the Foundation, which may be amended from time to time.

Sample Language to Include in a Trust to Create or Be Added to a Donor-Advised Fund (DAF):
All trust property not previously distributed under the terms of my trust or the sum of (insert dollar amount or percentage) of the rest, residue, and remainder of my estate shall be distributed to the Catholic Community Foundation of Los Angeles (the "Foundation"), a California not-for profit charitable corporation, to create or be added to the (insert fund name) Donor-Advised Fund to hold, manage, invest, and reinvest the same, collect the income therefrom, and make disbursements to such charities in compliance with the conditions in the DAF Instrument of Gift and the policies of the Foundation, which may be amended from time to time.

Sample Language to Include in a Will to Create or Be Added to a Restricted Donor-Advised Fund (DAF):
I do hereby give and bequeath the sum of (insert dollar amount) to the Catholic Community Foundation of Los Angeles (the "Foundation"), a California not-for-profit charitable corporation, to create or be added to the (insert fund name) Donor Advised Fund to hold, manage, invest, and reinvest the same, collect the income therefrom, and disburse (insert percentage) to the (insert formal name of the charity) to receive perpetual income distributions on an annual or more frequent interval to be used by the (insert name of the charity) to further its charitable programs in compliance with the policies of the Foundation, which may be amended from time to time.

Sample Language to Include in a Trust to Create or Be Added to a Restricted Donor-Advised Fund (DAF):
All trust property not previously distributed under the terms of my trust or the sum of (insert dollar amount or percentage) of the rest, residue, and remainder of my estate shall be distributed to the Catholic Community Foundation of Los Angeles (the "Foundation"), a California not-for profit charitable corporation, to create or be added to the (insert fund name) Donor-Advised Fund to hold, manage, invest, and reinvest the same, collect the income therefrom, and disburse (insert percentage) of the realized income to (insert formal name of the charity) to receive perpetual income distributions on an annual or more frequent interval to be used by (insert name of the charity) to further its charitable programs in compliance with the policies of the Foundation, which may be amended from time to time.



What You Can Give

Cash
One of the most common ways to make a gift to St. Pius X - St. Matthias Academy is to write a check, make a gift with a credit/debit card online through our website, or by sending physical cash.

Stocks and Bonds
Make a gift of publicly-traded securities to St. Pius X - St. Matthias Academy and potentially save on income and capital gains taxes.

Retirement Assets
A good option if you have a Roth IRA or a qualified retirement plan such as a 401(k) or 403(b). You do not expect to use all of your retirement plan assets during your lifetime, you have other assets (securities and real estate) that you want to pass to heirs, you may want to provide payments to loved ones after you are gone, or you would like to make a bequest gift to St. Pius X - St. Matthias Academy.

Life Insurance
A gift of life insurance that you no longer need can be an easy way to provide generous support for St. Pius X - St. Matthias Academy.

Real Estate
There are many options for donating your home, second home, commercial building, vacant land, or other real estate to St. Pius X - St. Matthias Academy. There may be a gift plan available that will help you achieve both your financial and charitable goals.

Personal Property
A gift of artwork, coins, antiques, or other personal property can be a great way to support St. Pius X - St. Matthias Academy.

"Your legacy is every life you have touched."
— Maya Angelou



Thank You









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