



How Can I Support Sacred Heart School?



**Every Contribution
Matters!**
**Thank you for your
support and generosity!**

Ways To Give

- **Gifts of Cash:**

Make an immediate impact on our school mission and benefit from a charitable income tax deduction.

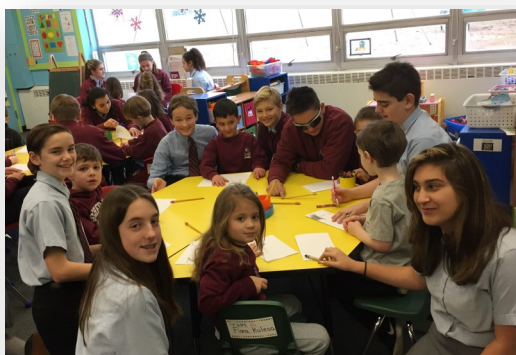
Please make checks payable to:
Sacred Heart School
Attn: Gia LaMontagne
289 Lafayette Road
Hampton, NH 03842

- **Online:**

Connect to the Sacred Heart School website (www.shshampton.org) to make a one-time, monthly, quarterly or yearly gift.

- **Matching Gifts:**

Many companies have matching gift programs that can double or triple the impact of the cash or stock gift you make to Sacred Heart School. Please check to see if your company participates in a matching gift program.



PLANNED GIVING

Gifts of Stocks and Bonds:

Making a donation to Sacred Heart School (SHS) of your in-kind appreciated securities allows you to avoid paying a capital gains tax on the amount that the securities have increased, while allowing you to earn a charitable deduction on the full value of the securities, including that portion that increased in value.

Donor Advised Funds: SHS is a 501(c)(3) charity and is approved to receive these donations. The owner can advise the fund's custodian to direct the donation to Sacred Heart School.

Life Income Gifts: Provides you with income and excellent tax benefits while giving generous support to Sacred Heart School. These include:

1. Charitable Gift Annuity (CGA):

Easy to set up and benefits you and SHS. You transfer your cash or appreciated property into the SHS charitable gift annuity, and in return, the annuity agrees to pay you and/or your spouse, or another beneficiary a fixed amount (with rates based on your age) every year for the remainder of your lifetimes. Gift annuities can also be deferred for an agreed number of years. The longer the gift annuity is deferred, the higher the annuity rate can be offered.

2. Charitable Remainder Trust (CRAT):

You transfer your cash or appreciated property to fund a SHS charitable remainder trust. The trust sells your property tax free and provides fixed

income to you or to other named income beneficiaries for life, a set number of years, or a combination of the two. Charitable remainder trusts can help you avoid capital gains taxes on the sale of your appreciated assets and offer a charitable income tax deduction for the remainder portion of your gift.

3. Charitable Lead Trust:

Allows you to designate your heirs as the ultimate beneficiaries while providing Sacred Heart School with an income stream for a term of years. You transfer assets to SHS or a trustee of your choice and during the term of years a fixed or variable income is paid to SHS. At the end of the term, the assets are transferred to your heirs. The charitable trust allows this transfer of assets to your heirs at a reduced gift and estate tax cost. This type of trust can have advantages for individuals with a high net-worth.



Bequests:

You designate Sacred Heart School as the beneficiary of your asset through your will, trust, or beneficiary designation form. You maintain ownership control of your assets during your life and make a gift of the asset to SHS when you pass away. A bequest establishes your wishes today and allows you to leave a lasting legacy to future generations. Your bequest can be unrestricted or designated for a particular purpose. If you are making a bequest to SHS, please let us know, so that we can recognize your generosity.

Retirement Plan Gifts:

At age 72 or older, you can take advantage of the IRA qualified charitable distribution (QCD) to avoid federal income taxes on your gift and qualify for your required minimum distribution (RMD). Retirement plan assets are often taxed at high rates. Therefore, it can be advantageous to pass other assets to heirs that are taxed at lower rates and donate retirement plan assets, such as 401(k), 403(b) or IRA's to Sacred Heart School.

Life Insurance Gifts:

Can be donated as a paid-up policy, or a policy that you are still making the premium payments on. Both cases may allow you to qualify for a charitable deduction.

Gifts of Real Estate:

Appreciated real property such as your home, vacation property, vacant land, farmland, a ranch, or commercial property can be given to Sacred Heart School by bequeathing the property, giving the property outright, transferring the property into a charitable remainder trust, or establishing a retained life estate. A retained life estate is established when you give your residence or vacation property to Sacred Heart School, but reserve the use of the property for your life and/or the life of another beneficiary. Gifts of this type may achieve capital gains tax avoidance and allow you to receive a charitable income tax deduction, while the value of the real estate is taken out of your taxable estate.

Endowments:

Gifts of any size can be invested in a Sacred Heart School endowed fund, or used to create a new fund. These funds help to ensure for a strong future for SHS and create a legacy of your own for generations to come. The endowment fund financial assets generate income through wise investment of the principal. Priority is placed on long-term growth of the endowment to satisfy future needs of Sacred Heart School and support the school's operating expenses.



SACRED HEART SCHOOL
HAMPTON | NEW HAMPSHIRE
—PreK-8 | Est. 1962

For more information contact:

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