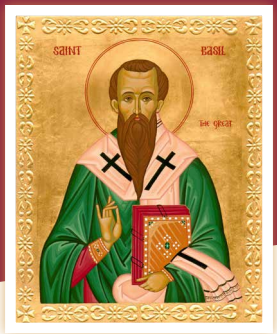
YOU MAY BE ASKING…



ST. BASIL SOCIETY of IOCC®
International Orthodox Christian Charities

"But I've already written my will…."

There's no need to write an entirely new will to add a bequest to IOCC. Have your attorney prepare a codicil, which makes the changes you want while reaffirming the remaining provisions of your existing will.

"Can my bequest provide for both you and my family?"

Some people ask if they can set up a gift plan in their will that first pays income to a loved one, then the remaining balance to IOCC. The answer is yes, most definitely! You can create a gift annuity or charitable trust in your will naming your spouse, children, or other loved one as the life income beneficiary(ies). So then, one bequest can take care of loved ones and provide a gift to IOCC, too. We recommend speaking with your financial advisors to establish such a bequest. Your financial advisors can provide projections of the income and tax benefits it can yield.

"My advisors suggested a trust, not a will…"

A revocable trust has many unique features, but your advisors will confirm that it works the same as a will in making a gift to IOCC.

"Are bequests deductible?"

Charitable bequests are not subject to federal estate tax or state inheritance taxes. A bequest to IOCC can lower the amount of your estate that is subject to the federal estate tax. However, there is no income tax deduction for a charitable bequest.

"Can you write a will for me?"

Sorry—no. Our role is to demonstrate to you and your attorney how easy and beneficial an estate-plan gift can be. IOCC cannot give you legal advice.

This publication is intended to provide general gift planning information. Our organization is not qualified to provide specific legal, tax, or investment advice, and this publication should not be looked to or relied upon as a source for such advice. Consult with your own legal and financial advisors before making any gift.

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