



# DREAM BIG

## 100<sup>th</sup> Anniversary Fund

A SUSTAINABILITY CAMPAIGN FOR THE SECOND CENTURY

## Ways to Give

Here are some ways of donating to Sacred Heart School in the short term:

<b><u>Gift Method</u></b>	<b><u>Details</u></b>
An outright gift of <u>cash</u>	Can be done via check, credit or debit card in one-time or monthly installments.
A gift of <u>appreciated stock or mutual fund shares</u>	Instructions to make a gift of stock or mutual fund shares can be provided upon request.
A gift through an <u>IRA Charitable Rollover</u>	<p>A qualified transfer will count towards your required annual IRA minimum distribution and be excluded from your gross income. To qualify for these benefits:</p> <ul style="list-style-type: none"> <li>○ You must be age 70 ½ or older at the time of the gift</li> <li>○ Your gift must be made directly from your IRA to the “Archdiocese of Boston for the benefit of Sacred Heart School, Roslindale”</li> <li>○ You may transfer up to a total of \$100,000</li> <li>○ The gift must be outright and cannot be used to create a gift annuity or charitable trust.</li> </ul> <p>This opportunity may have great tax benefits for you. Please let me know if you would like to make a gift in this manner.</p>
<u>Donor Advised Fund</u>	If you already have a Donor Advised Fund, you can recommend a grant to Sacred Heart School from the fund.
<u>Matching Gifts</u>	Many employers, both large and small, will match your gift to Sacred Heart School. Some will even match gifts by retirees. Please submit any required employer documentation with your gift.

### Sacred Heart School

1035 Canterbury Street ♦ Roslindale, MA 02131 ♦ Ph: (617) 323-2500 ♦ Fax: (617) 325-7151

[www.sacredheart-boston.org](http://www.sacredheart-boston.org)

**Additional “Ways to Give” Information:**

The Tax ID for Sacred Heart School is #04-3292732. Sacred Heart School is a 501(c)(3) non-profit Institution. Contributions should be sent to:

Sacred Heart School, 1035 Canterbury St, Roslindale, MA 02131

Attention: Ms. Colleen Verity with the notation “Dream Big 100<sup>th</sup> Anniversary”.

If you have any questions, please call Sheila Peterson at 508-613-6015.

**Planned Giving:** If you are interested in making a longer term planned gift (e.g., a will bequest, designation of the school as the beneficiary of a life insurance policy or 401(k) plan, etc.), please view the list of options on the Catholic Community Fund link below. The Catholic Community Fund is a resource for information about long-term planned giving for the parishes and schools in the Archdiocese.

<https://catholiccommunityfund.giftplans.org/index.php?CID=133&msect=2&process=1&compare=1&mid=6>

Please contact Lisa Lipsett at 617-746-5693 or [llipsett@rcab.org](mailto:llipsett@rcab.org) if you are interested in making a longer term planned gift.

**Sacred Heart School**

1035 Canterbury Street ♦ Roslindale, MA 02131 ♦ Ph: (617) 323-2500 ♦ Fax: (617) 325-7151

[www.sacredheart-boston.org](http://www.sacredheart-boston.org)