## Values Based Planning: A Roadmap to Guide You

VALUES BASED PLANNING:



Develop list of your items financial and sentimental

Identify people and organizations important to you

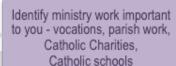


Contact the Catholic Community Foundation to discuss options for meeting your planning goals





Identify loved ones you would like to support







Support for education, personal care and other ongoing needs

Utilizing planning strategies that provide income and tax benefits; income for loved ones and support to ministry work



Gifts of specific assets



Support that continues beyond your lifetime, in perpetuity



Support that is a one-time gift

