



## Planned Giving

FAST FACTS

Your charitable gift to Father Joe's Villages is a personal expression of your goals, interests, and beliefs. Whatever the size or form of your gift, we will work with you and your financial advisors to prepare a plan that reflects your interests and objectives and provides maximum benefits both to you and to Father Joe's Villages.

# Charitable gift annuity still a great option for giving

Contributions can be made in cash or marketable securities

In today's uncertain economic times, there are still simple and advantageous ways to support Father Joe's Villages. One of the most popular giving vehicles is the charitable gift annuity, which not only offers the benefits of making a gift but also pays you income for the rest of your life.

The charitable gift annuity is popular because it's so straightforward. Your income payments are fixed and guaranteed for your lifetime. Upon your death, the remainder is paid to Father Joe's Villages. There are no asset management fees. The income payment doesn't change

for surviving spouses. **And – perhaps best of all – stock market ups and downs don't affect your income payment.**

If you are a donor over the age of 65 who is looking for a regular, predictable supplement to your income and you want to support Father Joe's continuing work with the homeless, a charitable gift annuity may be a great fit. Contributions can be made in cash or marketable securities, such as stocks, bonds or money markets. Depending on your age, you may be able to get an interest rate as high as 11 percent on your investment.

You can choose to begin

receiving payments immediately upon making your gift, or to defer payments until you have greater need of them. With a gift annuity, you make an irrevocable commitment to supporting the work of Father Joe's Villages, avoid immediate capital gains tax on a gift of appreciation, receive a federal income tax deduction for part of the gift, and remove the property from your probate estate. What a great option for giving!

Contact Planned Giving Officer Joseph Perucca today for more information. ■

## IRA rollover extended through 2009

Good news! Last year we noted December 31 as the final day to roll over your IRA to charity, but Congress has extended that provision through this year and next, so you didn't miss your chance.

The new act allows an IRA owner age 71½ or older to directly transfer an IRA to a charity without penalty, up to a value of \$100,000. Couples over age 71½ with separate IRAs may each transfer that amount, for a combined limit of \$200,000.

How does this benefit you?

Rolling over your IRA is an excellent way to donate

to the important programs at Father Joe's Villages without having to worry about taxes or fees. And you may continue to make your regular cash gifts up to the federal limit, so you can give more without paying any more in taxes. These transfers can be applied toward the required minimum distribution that IRA owners over age 70½ must take each year.

For more information or to discuss your IRA rollover to Father Joe's Villages, please contact Planned Giving Officer Joseph Perucca at 619.446.2143 or [jperucca@neighbor.org](mailto:jperucca@neighbor.org). ■



VILLAGE NEWS Miriam H. DiBiase

Sonia, a TAAS graduate and Pierre's Place employee, and Director of Toussaint Youth Villages Rick Newmyer performed at the luncheon.

## Donors enjoy lunch at Pierre's Place

By Miriam H. DiBiase

More than 80 friends of Toussaint Academy gathered for a special luncheon on September 13 hosted by the Father Joe's Villages Planned Giving department at Pierre's Place. Attendees enjoyed pizza, panini, salad, and gelato in the award-winning café's bright dining room.

After a delicious lunch, Pierre's Place staff member Sonia, a former resident, sang three songs accompanied by Toussaint Youth Villages Director Rick Newmyer on guitar. Guests enjoyed a video presentation on "A Children's Village," a future project in Campo for homeless youth, and a question-and-answer session with Father Joe Carroll to discuss topics such as our new building projects, Father Joe's health, and the programs available for teens at Toussaint Academy.

Attendees were then encouraged to join tours of Toussaint Academy led by resident teens. Everyone who took the tour appeared impressed with the facility, the school rooms and – most of all – the teenagers themselves.

Guests had been invited to bring gifts for the 10 Toussaint graduates who began college this fall. The pile of laundry baskets, towels, utensils, detergent, and other gifts eventually became too large to fit inside Pierre's! Donors to Toussaint Academy and Father Joe's Villages are very generous and their support encourages our teens to work hard to become productive young adults. ■

## Yes, I want to know more about Planned Gifts!

Please send me more information on how a Planned Gift to Father Joe's Villages® will benefit me.

- Bequest                       Pooled Income Fund                       Life Estate  
 Charitable Remainder Trust     Bank Account Benefit                       IRAs/Life Insurance  
 I / We named Father Joe's Villages in our estate plans.

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ E-mail me at: \_\_\_\_\_

Please make your choice of Father Joe's Villages:

- St. Vincent de Paul Village  
 Martha's Village & Kitchen  
 Toussaint Youth Villages  
 Toussaint Academy of the Arts and Sciences  
 A Children's Village  
 Rancho San Vincente  
 National AIDS Foundation /Josue Homes

Please detach and send to: Joseph Perucca, Planned Giving Officer  
Father Joe's Villages®, 3350 E Street, San Diego, CA 92102-3332



## Estate Planning

Using beneficiaries' full names – spelled correctly – and including up-to-date addresses is half the battle in creating an indisputable estate plan. If you have remembered one of Father Joe's Villages in your plan, check your documents and be sure this information is current and accurate:

### Father Joe's Villages

3350 E Street, San Diego, CA 92102-3332 • Tax ID 33-0492304

### St. Vincent de Paul Village

3350 E Street, San Diego, CA 92102-3332 • Tax ID 33-0492302

### Martha's Village & Kitchen

83791 Date Avenue, Indio, CA 92201-4737 • Tax ID 33-1777892

### Toussaint Youth Villages

3350 E Street, San Diego, CA 92102-3332 • Tax ID 91-2154722

### National AIDS Foundation/Josue Homes

3350 E Street, San Diego, CA 92102-3332 • Tax ID 33-0781710

Questions: Contact Joseph Perucca at  
619.446.2143 or [jperucca@neighbor.org](mailto:jperucca@neighbor.org).