



Bequest Gift Information

Thank you for considering including St. John Neumann Catholic Church (SJN) in your estate plans. Some basic information related to bequest gifts is included below. Bequest gifts can be designated to St. John Neumann Catholic School as well.

Bequest Benefits

Making a bequest gift is a great way to establish a personal legacy, decrease tax obligations on your family, and perhaps benefit from estate tax savings. A bequest is typically revocable, enabling you to modify it at a later date if needed. The gift can be unrestricted or it can be designated for a particular purpose (debt reduction, student financial assistance, etc.).

There are a variety of ways you can make a bequest to SJN, such as a specific dollar amount or asset (car, real estate, etc.), a percentage of your estate, a residual bequest, or a contingent bequest. Your professional advisor or attorney can help provide language to include in your will or trust to name SJN as a beneficiary in your estate plan.

Basic Bequest Language

Below is an example of basic language to include in your estate plan for a bequest of a specific dollar amount. This is simply suggested language to provide a starting point when working with your attorney or professional advisor. Different language can be used for other types of bequest gifts, with which we can assist your attorney or professional advisor.

"I hereby give, devise, and bequeath _____ and No/100 dollars (\$DOLLARS) to St. John Neumann Catholic Church, a nonprofit organization located at 633 St. John Ct., Knoxville, TN, 37934, Federal Tax ID #62-1007428, for St. John Neumann Catholic Church's general use and purpose."

If you have any questions or would like additional information, please contact Patrick Wade, SJN Director of Development at (865)777-3410 or pwade@sjnknox.org.

"You shall surely give to him, and your heart should not be grieved when you give to him, because for this thing the Lord your God will bless you in all your works and in all to which you put your hand."
Deuteronomy 15:10

This document is designed to provide general information that we hope will be helpful to you in your tax, estate, and charitable planning. It is not intended as legal advice and should not be relied upon as legal advice. For advice or assistance with your particular situation, you should consult an attorney or other professional advisor.