

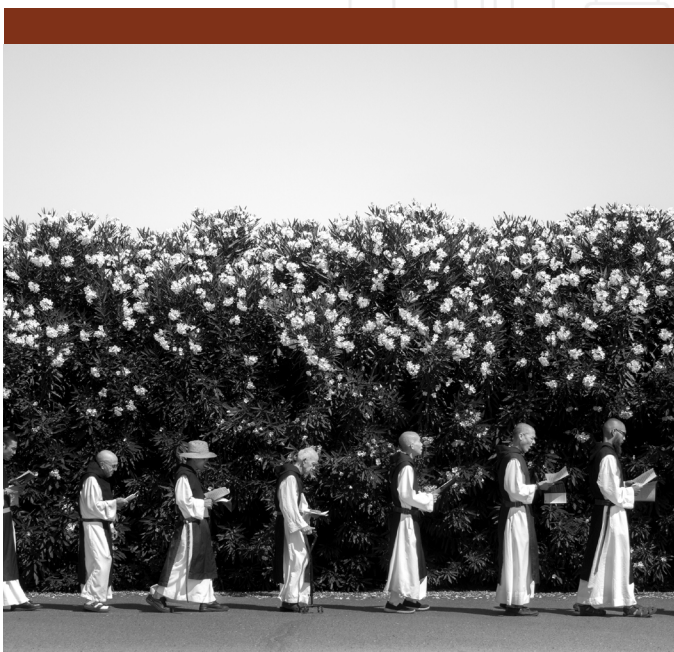
“What We Love We Shall Grow to Resemble”

-St. Bernard of Clairvaux

St. Bernard, founding abbot of Clairvaux Abbey in Burgundy, France, was one of the most commanding Church leaders in the early twelfth century. The St. Bernard Society welcomes the legacy gift commitments made by you, our donors and friends. Through your prayerful offerings, you have given selflessly to God as God has given selflessly to you.

Your society membership provides you with the following benefits:

- Exclusive Perpetual Mass Enrollment
- Annual Mass and Luncheon in Vina
- Monastery Picture Book



Leave a Legacy

- Visit newclairvaux.org/development
- Consult your advisors
- Contact our Development Department
530. 839. 9936
donorservices@newclairvaux.org



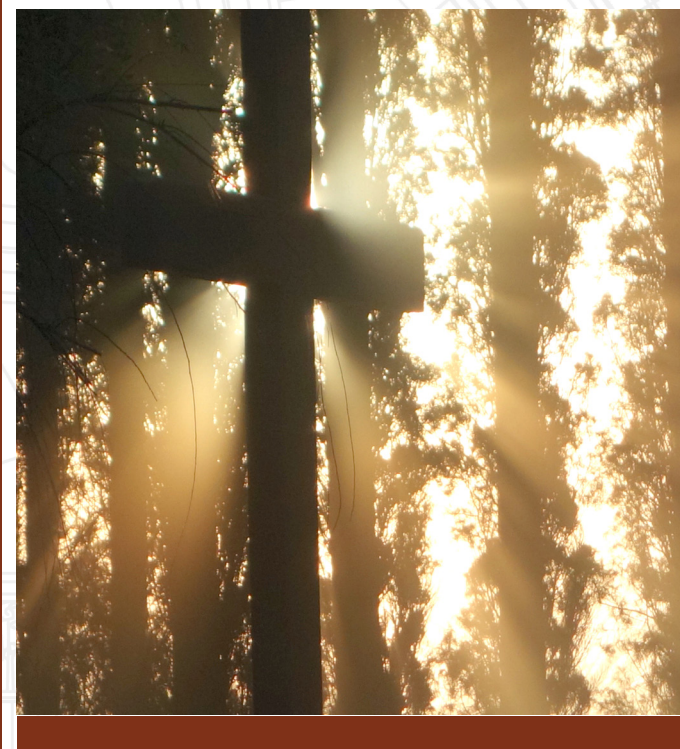
THE ABBEY OF OUR LADY OF
NEW CLAIRVAUX
VINA, CALIFORNIA

PO Box 80
Vina, CA 96092-0080
530.839.9936
newclairvaux.org



Saint Bernard Society

The Abbey of Our Lady of New Clairvaux



“Spiritual life is like
living water that springs up
from the very depths of our
own spiritual experience. In
spiritual life, everyone has
to drink from his or her own
well.”

-St. Bernard of Clairvaux

Planned Giving Options

Giving in sensible and effective ways
can minimize your tax burden and
optimize your giving dollars.

BEQUEST

A gift to the Abbey of cash, assets or real property as described in a will or trust arrangement.

IRA ROLLOVER GIFT

If you are 72 or older, you may be able to lower the taxable income of your IRA withdrawals.

- Avoid taxes on transfers to charities of up to \$100,000 from your IRA.
- Satisfy your required minimum distribution (RMD) for the year.
- Reduce your taxable income, even if you do not itemize deductions.
- Make a gift that is not subject to the deduction limits on charitable gifts.

Next Step: Contact your IRA plan administrator and advisor to make an IRA gift. Your qualified IRA withdrawal will be paid directly to the Abbey of New Clairvaux. IRA charitable distributions DO NOT qualify for a charitable deduction.

GIFT OF SAVINGS BONDS

Include a provision in a your will or trust that allows the Abbey to receive these items, income and estate tax-free.

GIFT OF LIFE INSURANCE

Naming the Abbey as beneficiary of a new or existing policy or transferring ownership of a policy for which the donor continues to pay premiums.



Give thanks to
the Lord for He
is good;
His mercy
endures forever.
- Psalm 107: 1

GIFT THROUGH A CHARITABLE LEAD TRUST

An immediate gift placed in trust that pays income to the Abbey for a term of years. After the term expires, assets are return to your loved ones or to you, according to the terms of the trust.

GIFT THROUGH A CHARITABLE REMAINDER TRUST

This future gift placed in an irrevocable trust pays the donor income for life or a term of years. Thereafter the remaining trust assets are gifted to the Abbey.

GIFT OF RETIREMENT PLANS IRA, 401K, 403B, 457

Naming the Abbey of New Clairvaux, Inc. as a beneficiary avoids income and estate taxes.

GIFT OF REAL ESTATE

A gift of real property, e.g., home, vacation property, vacant land, farmland, ranch or commercial property, can make a great gift to the Abbey. You avoid paying capital gains tax, receive a charitable income tax deduction and leave a lasting legacy.

LIFE ESTATE RESERVED

Leave your home, ranch or farm to The Abbey of New Clairvaux, Inc. at your death, but would like to receive a current charitable tax deduction. You can receive a current federal income tax deduction for the present value of the remainder interest in your property and preserve your lifetime use and control of your home, ranch or farm while you are still alive.