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## Estate Planning - The Essential Documents

The New Year is perfect time to make an assessment of ones important legal documents for future use. Having an estate plan is good Catholic stewardship. About 70% of Americans do not have an estate plan. If they do, it's outdated. Most Catholics want to be good stewards of the financial resources entrusted to their care, but do not have a complete plan.

### **Some ideas that assist in a Catholic Estate Plan include:**

**A Faithful Estate Plan:** It is a plan that assures that all your final wishes will be carried out in a manner that is faithful to your familial obligations and to your Catholic beliefs as well.

**Directions For Receiving Catholic Sacraments:** It is a good idea to provide your family with written directions on a Priest to call to administer sacraments like anointing of the sick and viaticum. You may also want to have a checklist that goes over your wishes concerning funeral arrangements like where to have the wake, details concerning the funeral mass and whether you want masses and prayers said for you after you pass on.

**Catholic Legacy Will:** Your estate plan can do more than just pass on your earthly possessions. Your estate plan can include a Catholic Legacy Will that consists of inspirational testimony which expresses to your family your deep and lasting love for Christ. You can poignantly communicate to your loved ones your wish that they live Christ-centered lives.

**Catholic Health Care Document:** Your Estate Plan can include an Advance Medical Directive stating your wishes concerning health care and states treatment that you do want, such as life-sustaining care and relief from pain. Of course, your Advance Directive should also reflect the teaching of the Catholic Church on the sanctity of life. Pope John Paul II's encyclical, Gospel of Life, is an excellent guide in making life decisions. In addition, the United States Conference of Catholic Bishops has resources on the teaching of the Church on these important end-of-life issues.

**Remembering the Church In Your Estate Plan:** We greatly appreciate our friends and supporters who hear the call to "give back" to the Catholic Church that spiritually enriched them during their lifetimes. With tax-wise estate planning you can reduce your taxes, achieve financial goals

and also leave a lasting financial for your parish community. We greatly appreciate our generous friends and supporters who remember us in their estate plans. **If you would like more information, ideas, or help with this process, please call Barbara Kilarjian, tel. 516-678-5800 ext. 257, email bkilarjian@drvc.org**

## HAPPENING IN THE DIOCESE!

Join us for a free Webinar  
**TAX STRATEGIES IN 2023**  
January 26 --1 pm to 1:45 pm

Topics covered:

- Updates on Gift and Estate Tax Exemptions
- Tax Saving Strategies with IRAs
- 2023 Legacy IRA Act
- Estate Planning Strategies

Guest Speakers include:  
Vincent J. Russo, Esq. and Marie Elena Puma Esq.

Moderated by Mark Henry, author of Finish Faithful -- How to Create a Lasting Christian Legacy for Your Family

*This is a free seminar and no solicitations will be made.*

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Your gifts to the Catholic Ministries Appeal support The Office of Human Life, Family and Bioethics which provides a wide-range of valuable resources on all life topics. Be informed on legislative issues and learn how our Catholic moral teaching is applied to matters of daily living especially in the biological sciences and healthcare.

**[Click here to view these resources](#)**

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