



Bequest Language for Diocese/Parish/School or Agency Catholic Diocese of Jefferson City

The Catholic Diocese of Jefferson City, Missouri (the “Diocese”) is a tax-exempt entity under the Internal Revenue Code. Gifts and bequests to the Diocese, its parishes, schools and agencies are exempt from income, gift and estate taxes.

The language below is recommended for gifts and bequests to the Diocese or any of its parishes, schools, agencies or special ministries which the donor would like to specify. Every donor has the assurance that each Diocesan beneficiary will use a gift or bequest for the purpose specified.

- **Unrestricted bequest to the Diocese**
I give, devise and bequeath (*here designate the percentage of your estate; the specific dollar amount; a description of the item or property; or “the remainder of my estate”*) to The Catholic Diocese of Jefferson City, Missouri, for its exempt purposes, without restriction.
- **Unrestricted bequest to Diocesan parish, school or agency (Parish example)**
I give, devise and bequeath (*here designate the percentage of your estate; the specific dollar amount; a description of the item or property; or “the remainder of my estate”*) to (*here name the parish and city; school and city; agency; or special ministry*)
Example: St. Joseph Cathedral Parish, Jefferson City, Missouri, for its exempt purposes, without restriction, but if the St. Joseph Cathedral Parish is not then in existence, then to The Catholic Diocese of Jefferson City, Missouri, for its exempt purposes, without restriction.
- **Restricted bequest to Diocesan parish, school, or agency (Parish Endowment example)**
I give, devise and bequeath (*here designate the percentage of your estate; the specific dollar amount; a description of the item or property; or “the remainder of my estate”*) Example: to the parish endowment of the Sacred Heart Parish, Columbia, Missouri, Missouri, but if said endowment is not then in existence, then to the Sacred Heart Parish, for its exempt purposes, without restriction, but if the Sacred Heart Parish is not then in existence, then to The Catholic Diocese of Jefferson City, Missouri, for its exempt purposes, without restriction.

For further information, please contact E. Jane Rutter, Director, Stewardship & Planned Giving Office at 573-635-9127 ext. 213 or e-mail at stewardejr@diojeffcity.org