

YES! I am interested in



- I am interested in establishing a planned gift to benefit the Outreach.
- I would like more information about my planned giving options.
- I have a client/clients who may be interested in making a planned gift to benefit the Outreach

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

I am interested in:

- Wills and Bequests
- Gifts of Life Insurance
- Gifts of Tangible Property
- Charitable Lead Trusts
- Charitable Gift Annuities
- Other \_\_\_\_\_



All inquiries will be kept confidential. Please return this form to:

Director of Development  
Our Lady of Mercy Community  
Outreach Services, Inc.  
P.O. Box 607  
Johns Island, SC 29457

Telephone (843) 559-4109  
Fax (843) 559-8819  
www.olmoutreach.org  
info@olmoutreach.org

*Dear Friends and Supporters of the Outreach:*

*In 1989, the Sisters of Charity of Our Lady of Mercy created an organization "to provide educational, health and direct outreach services to people in need on James, Johns and Wadmalaw Islands while encouraging and supporting self-sufficiency and self-esteem."*

*That humble beginning led to what is now known as Our Lady of Mercy Community Outreach Services, Inc. Last year we provided outreach, educational and wellness services to over 11,000 individuals.*

*As the number of people served has grown, the resources required by the Outreach have increased as well. In response to this need, the Outreach has established "The Sisters' Circle", a group of lay people who make a significant planned gift—a bequest, a trust, an annuity or similar donation—in the spirit of the Sisters of Charity of Our Lady of Mercy who established the Outreach with their own such gift.*

*To find out if planned giving is right for you, we suggest that you talk to your attorney, accountant or other tax advisor. If you determine that you would like to make a planned gift and join The Sisters' Circle, we will be happy to work with you. Please know that we deeply appreciate your generosity, thoughtfulness and concern for those whom the Outreach helps. God bless you!*

*Sincerely,*

A handwritten signature in blue ink that reads 'Sister Mary Joseph'.

*Sister Mary Joseph Ritter, OLM  
Executive Director*



*Planned Giving*  
to Benefit

Our Lady of Mercy Community  
Outreach Services, Inc.

## *Our Lady of Mercy Community Outreach Services, Inc.*

Known by many simply as “the Outreach,” the agency provides emergency assistance, education and wellness services to the economically poor of Johns, James, and Wadmalaw Islands, and the Neighborhood House in Charleston. Assisted by the services of over 250 volunteers, and supported by donations from the community, The Outreach serves over 11,000 people per year.



## *The Sisters' Circle*

In 1989, the Sisters of Charity of Our Lady of Mercy established Our Lady of Mercy Outreach with a significant gift. That endowment has grown over the years, but not enough to defray all of the costs associated with the many services the organization now provides. Today, the Outreach is challenged as never before.

Your planned gift can support the Outreach for many years to come, and it may provide benefits to both you

and your heirs. Some of the most popular options are described in this brochure. Please consider the information contained in this brochure a starting point, and consult with your attorney and tax advisor before making any planned gifts.



There are many ways to provide a planned gift. We have summarized some of the most popular.

## *Wills and Bequests*

A bequest, or other testamentary gift, is one of the simplest and most popular ways to benefit a charity. Bequests are usually deductible for estate tax purposes. Through a bequest, a donor can give the Outreach a specific amount of money, a specific property, or a percentage of assets.

## *Life Insurance*

Our Lady of Mercy Community Outreach Services, Inc. may be named as a beneficiary of a life insurance policy. Or, a paid-up life insurance policy may be given to the Outreach with the Outreach named as the beneficiary.

Gifts of life insurance may provide donors with significant tax savings while giving important assistance to the Outreach.

Working with your attorney, accountant or other tax advisor, the Outreach can assist you in determining if a gift of this sort is appropriate for you and your goals.



## *Gifts of Tangible Property*

A gift of a residence, real estate, precious object or collection is a very personal and significant way to benefit the Outreach. In addition to providing donors with a deduction, such gifts may also eliminate liability for long-term capital gains taxes. Some elect to donate a home while retaining the right to live in it for the rest of their lives.



## *Charitable Lead Trusts*

This is a way to provide a current or future gift to the Outreach, and eventually pass along assets to heirs. Such a gift may provide substantial tax benefits.



## *Charitable Gift Annuities*

These are gift plans that provide the donor, or someone named by the donor, with a fixed income for life. The donor may also take a charitable deduction for a portion of the gift in the year in which the gift was made.



*The  
Sisters  
Circle*