



CALLED TO SERVE SECURING OUR LEGACY OF CARE FOR THE SICK AND THE POOR A Campaign for the Order of Malta, American Association



The Called to Serve Capital Campaign continues secure our legacy of care for the sick and the poor. We have over \$18.2 million committed towards our \$20 million goal. We look forward to reaching \$19 million by the Lourdes Pilgrimage in early May, positioning us to exceed our goal this summer.

Recently, all Members received an invitation to consider if the circumstances are right to make a planned commitment at this time and as a part of the Called to Serve campaign. A planned gift is a donation recorded today, but not fulfilled until a future date, perhaps decades from now. Planned gifts take different forms and provide different benefits, such as federal and state tax deductions, increasing your income, reducing capital gains tax, and lowering estate taxes. Crucially, planned gifts can also reduce the burdens your descendants may feel after your passing.

Our Members do extraordinary work daily, improving the lives of those who need us most. Planned gifts are an essential way our hands-on works and ministries in our Areas can continue for generations to come.

There comes a time in every person's life when they must turn their attention to the impact they want to make and the legacy they want to leave. The following pages detail how, through planned gifts, your compassion can secure for you, and the American Association, a legacy that will endure.

PLANNED GIFTS RECEIVED TO DATE

\$1,000,000
Largest Planned Gift

29
Total Number of
Planned Gifts

15
Number of Planned
Gifts of \$100,000+

\$132,708
Average Planned
Gift Value

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Rory and I had always planned to include the Order of Malta in our estate plan because of our belief in the mission of the Order. The Called to Serve Campaign has provided the opportunity to focus on how best to support the Order today and in the future. We decided to give a cash pledge over five years and to structure our planned giving by designating a portion of our retirement funds with the Order as beneficiary. We see this as tax efficient since it protects those amounts from income tax that would apply if the beneficiary were our estate or our children.”

CAMILLE KELLEHER, DMOB, AND RORY KELLEHER, KMOB



SUMMARY OF PLANNED GIVING VEHICLES

GIVING VEHICLE	IF YOUR GOAL IS TO...	THEN YOU CAN...	AND YOUR BENEFITS ARE...
Bequest	Defer a gift until after your lifetime	Put a bequest in your will (cash, property, or a share of the residue)	A gift that is fully exempt from estate tax
Gift of Retirement Assets	Avoid the twofold taxation on IRA or other employee benefit plans	Name us as the beneficiary of the remainder of the assets after your lifetime	The ability to leave your family other assets that carry less tax liability
Gift of Life Insurance	Make a large gift with little cost to yourself	Contribute a life insurance policy that you no longer need	Current and possibly future income tax deductions
Gift of Real Estate	Avoid capital gains tax on the sale of a home or other real estate	Donate the property to the American Association	An income tax deduction, plus reduction or elimination of capital gains tax
Charitable Gift Annuity	Receive fixed annual payments that are partially tax-free	Create a charitable gift annuity	Current and future tax savings on income taxes, plus stable payments
Charitable Lead Trust	Reduce gift and estate taxes on assets you pass to children or grandchildren	Create a charitable lead trust that pays income to us for a specific term of years	Reduces your taxable estate, and your family is able to keep the property
Charitable Remainder Annuity Trust	Secure a fixed life income while avoiding market risks	Create a charitable remainder annuity trust	Tax benefits and often a higher rate of return
Charitable Remainder Unitrust	Create a hedge against inflation over the long term	Create a charitable remainder unitrust	Tax benefits and a variable income for life

SECURING YOUR LEGACY

To learn more about securing your legacy with the American Association, contact

Fr. David Sellery

Director of Development and Member Engagement
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CAPITAL CAMPAIGN UPDATE



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Joining the Order of Malta has been one of the best things I have ever done. For me, everything comes down to our mission to help the poor and the sick. I decided to make a blended gift [part cash and part planned] because I want to help people in need today, but I also want to help ensure the Order continues in perpetuity.”

CYNTHIA (SUZY) MORAN, DMOB



PLANNED GIVING ADVISORY COMMITTEE

Our Planned Giving Advisory Committee, comprised of Knights with decades of combined expertise, have offered to provide assistance to you as you reflect on this invitation:

Joseph (Joel) H. Miller III, KM
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The Order of Malta, American Association, is not a financial, legal, or tax advisor. As with any decision involving your estate plans, donors are advised to consult their own professional tax and legal advisors for more information and guidance.

