Naming St. Michael, their parish of 53 years, in their estate plan was a natural decision for Les and Jan Blum of Harlan, Iowa.

“Someone provided a place of worship for us so we must provide that for the next generation,” said Les.

“We were both brought up by parents and grandparents that instilled in us the importance of supporting the Church,” said Jan.

Just as natural to Les and Jan Blum is their active involvement in the parish and local community despite being “kind of retired.”

Jan is in charge of funerals as St. Michael along with service as an usher and Eucharistic minister. Les belongs to the parish foundation, is a member of the local Knights of Columbus, and serves as a Eucharistic minister to the homebound and elderly of the parish.

After completing a 30-year career at Myrtue Memorial Hospital, Jan maintains a presence at the hospital as a gift shop volunteer and auxiliary member. She also finds time to work at the Petersen Family Wellness Center a few days a week. Les has farmed and worked construction in the Harlan area for his entire adult life.

October 2018 will mark the couple’s 53rd wedding anniversary. In keeping with the Catholic family legacy, Les and Jan share a strong sense of faith with their four children and ten grandchildren.

“We hope and pray our children and grandchildren will continue to attend Church and do what they can to support the parish. Things are so different now days so we can only pray and encourage them to keep the faith,” said the Blums.
CATHOLIC FOUNDATION OF SOUTHWEST IOWA HAS NEW DIRECTOR OF PLANNED GIVING

By Kelly Mescher Collins, Multi-Media Journalist – Diocese of Des Moines

Brooke Pulliam has started as the director of planned giving for the Catholic Foundation of Southwest Iowa, a position that was newly created.

In this new role, Pulliam is responsible for facilitating planned giving initiatives in support of Catholic schools, parishes and organizations within the Diocese of Des Moines. Pulliam specializes in working with individuals and couples who have a desire to create a lasting legacy of financial support in our Catholic community.

“I think the most exciting thing is the impact we can have today on the diocese and on our future generations,” Pulliam said. “Planting the seed now benefits our kids and our grandkids and leaves a legacy.”

Pulliam appreciates the long-lasting impact donors can have. Planned gifts can be earmarked to go to your parish, Catholic school, seminarians, or any other Catholic entity you’d like to help.

It also makes sense to plan your gifts now, Pulliam added.

“I think people are sometimes uncomfortable talking about end of life issues,” Pulliam said. “It’s really important to have those conversations with families while everyone is living so families understand wishes and intentions.”

Planning your gifts now also helps prevent family disagreements down the road when adult children don’t see eye to eye on who their parents wanted to help.

“It’s a gift to your children by having it all on paper so there’s no question in anyone’s mind about their parent’s desires,” Pulliam added.

She and her husband David are members of Sacred Heart Parish in West Des Moines. Their oldest daughter, Taylor, is a senior at Iowa State. Their daughter Laney is a junior at Dowling Catholic High School and their son Nick is an 8th grader at Sacred Heart Catholic School.

To learn more about how the Catholic Foundation of Southwest Iowa can help you with planned giving, contact Pulliam at 515-237-5080 or email bpulliam@catholicfoundationiowa.org.
WHY HAVE A WILL?

A will, also referred to as a Last Will and Testament, directs the disposition of your property upon your death. It is especially important to have a will if:

1. You have a minor child. In your will, you can name a preferred guardian. Also, you can name a custodian or trustee to manage money and property for a child.

2. You want to leave something to your parish or another non-profit organization. Although retirement accounts, life insurance, and certain other accounts can be left directly to an organization through a beneficiary designation, most assets can only be left to a non-profit through a will or trust.

3. You want to address special needs. A will can include special provisions for someone with a disability, addiction, or poor financial management skills.

4. You don’t have children. Consider your legacy—what non-profit organizations or individuals do you want to benefit?

5. You have a complex family or financial situation.

6. You want to leave assets to non-profits or individuals on a tax-advantaged basis.

7. You want peace of mind that upon your death, your assets will be distributed in accordance with your wishes.

Depending on your circumstances, in addition to a will, your attorney may recommend a revocable trust or other documents as part of your planning. Tax considerations may also impact your specific plan. Consult an attorney of your choice for further information.

HOW TO REMEMBER YOUR CATHOLIC PARISH, SCHOOL, OR ORGANIZATION IN YOUR WILL OR TRUST

Share the following language with your estate planning attorney to add to your will or living trust.

I give, devise and bequeath to the Catholic Foundation of Southwest Iowa, 601 Grand Ave. Des Moines, Iowa 50309, Federal Tax Identification Number 45-5577090 ________________ (percent of my estate, dollars, property, securities, etc.) to be used for ______ (however you wish for your gift to be used) within the Diocese of Des Moines.

The Catholic Foundation of Southwest Iowa is acknowledged by the Diocese of Des Moines as the preferred channel for administering trust and estate gifts that benefit the diocese. This is accomplished by using the name Catholic Foundation of Southwest Iowa in your legal documents. Please contact the Catholic foundation for additional information.

Upcoming CFSWIA Events:
Wills & Planned Giving Seminar | Our Lady's Immaculate Heart, Ankeny – September 27
Wills & Planned Giving Seminar | Sacred Heart, West Des Moines – October 18
Wills & Planned Giving Seminar | Sacred Heart, West Des Moines – October 19

CFSWIA Parish Gatherings:
St. Pius X, Urbandale Presentations – September 29 – 30 Weekend Masses

For more details on our events please visit www.catholicfoundationiowa.org or call (515) 237-5044.