

Preparing for the future

Parish estate planning seminars applicable, informative

by KATIE MOORE

staff writer

CHARLOTTE — Approximately 70 people attended an estate planning seminar sponsored by the Foundation of the Roman Catholic Diocese of Charlotte at St. Gabriel Church April 28.

Father Frank O'Rourke, pastor of St. Gabriel Church, opened the seminar with a prayer and spoke briefly about stewardship and planned gifts.

"Gathering for the will seminar at St. Gabriel's made me mindful of how fortunate we are in the Diocese of Charlotte to have professionals in this area who share information that is so helpful," said Father O'Rourke.

"Infusing stewardship principles into estate planning, wills and end of life issues is a blessing," he said.

John Engler, parishioner and co-chair of the parish planned giving committee, introduced the speakers, who included Don Hodgens, parishioner and co-chair of the committee; and Judy Smith, director of planned giving for the Diocese of Charlotte.

Topics covered included wills, powers of attorney, trusts and bequests.

There was also a presentation on the Catholic Heritage Society — an honorary society open to anyone who agrees to make a planned gift to the foundation, the Diocese of Charlotte or any of its parishes, schools, agencies or organizations.

"A question and answer period follows each seminar and gives those attending an opportunity to have many of their questions answered by an attorney in a relaxed environment," said Smith.

Hodgens, a retired estate planning attorney, was available to answer legal questions.

"The foundation office conducts these free seminars on a regular basis to help raise awareness of parishioners on the importance of taking care of their loved ones and continuing their stewardship to the church through the process of estate planning," said Smith.

All attendees received packets of take-home materials, including an estate planning toolkit.

WANT MORE INFO?

The next estate planning seminar will be May 19 at Sacred Heart Church in Salisbury. To schedule a seminar at your parish, contact Judy Smith, planned giving director, at (704) 370-3320 or jmsmith@charlottediocese.org.