

The GIFT PLANNER

INVESTING IN TOMORROW'S CHURCH

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Conversion of heart and mind leads to giving



Fr. Joseph Ziliak

Fr. Joseph Ziliak has been influenced by Benedictines all of his life. And after 53 years as a priest, perhaps it's no surprise that he wants to give back in gratitude for their guidance.

His Catholic upbringing began at St. Benedict's Church in Evansville, IN, which was founded and staffed by monks of Saint Meinrad Archabbey. He was baptized there and attended the parish school, where Benedictine sisters from Ferdinand were teachers.

Fr. Gabriel Verkamp, OSB, was the pastor at the time; he later

became the sixth abbot of Saint Meinrad. Another of the monk priests first asked Fr. Joe if he had any interest in being a priest. He agreed to visit Saint Meinrad and subsequently enrolled.

At 13, he became a student at Saint Meinrad High School. Fr. Joe was a Saint Meinrad student from 1950-58, completing high school and college.

Fr. Joe recalls Saint Meinrad as a good place to get an education. "I had good years there.... We played sports and studied. It was just a good life." He was involved in directing music and served as

first prefect – the highest student position in those days – as a sixth-year student.

Fr. Joe was then sent to Innsbruck, Austria, to complete his seminary education. After he was ordained in 1962, he returned to the Diocese of Evansville and helped to oversee and teach at a new diocesan-run high school for boys interested in priesthood. He then became involved in communications – first as director of radio and television for the diocese and later as editor of the diocese's newspaper, *The Message*.

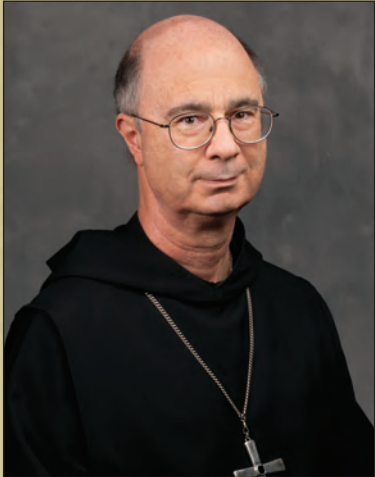
On the weekends, he was serving in parishes around the diocese. In 1987, he moved from newspaper editor to pastor of what would become the most populous parish in the diocese, St. John the Baptist Parish in Newburgh. He served there 25 years until he retired in 2012.

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Saint Meinrad
Archabbey and
Seminary & School of Theology





**Rt. Rev. Justin DuVall, OSB
Archabbot of Saint Meinrad**

Dear Friends,

In my final few months as archabbot, I continue to be inspired and humbled by the generosity demonstrated by our friends and alumni. These expressions of generosity take many forms and each is gratefully received.

Oftentimes, the most meaningful and generous gifts we receive come in the form of last gifts—gifts made to us upon the passing of a donor as a result of his or her thoughtful planning during life. By way of this newsletter, we offer you some suggestions on ways you might wish to arrange for such a gift.

Your faith and support have been necessary for us to continue and advance our work. In addition to the work of educating ordained and lay ministers for the Church, your partnerships assist us in providing retreats here on the Hill and elsewhere, offering pastoral assistance to parishes in several dioceses, sponsoring an Oblates of St. Benedict program, and a number of other ministries.

It is my privilege to thank you, on behalf of my brother monks, for the many ways you support our work and mission. Be assured of our prayers for you, both in thanksgiving and for God's graces.

+ Justin DuVall, OSB

Fr. Joe had made gifts to his alma mater, but it wasn't until he was pastor and using that role to teach others about giving and good stewardship that he had a change of heart. "It finally dawned on me that that was something I needed to do as well," he recalls.

"OK, if I'm not able to give 10%, at least I start with something," he remembers thinking. "And from there it went on to where it's more than 10% today." He found numerous examples in Scripture where the Lord is never outdone in generosity, and it began to change his outlook on giving.

"It was a conversion of mind and heart, and that's where I think the center of stewardship and philanthropic giving begins – it's a conversion inside the person," says Fr. Joe. This epiphany offered another advantage for him. "I could speak differently to the people [in my parish]. Before, it was always a task." As a giver

himself, he could now speak from the heart about generosity.

One of his preferred ways to make charitable gifts is through an Individual Retirement Account (IRA). At age 70½, you are required to take a minimum distribution from your IRA. For those who don't want or need to take a distribution from their IRAs, a new law allows them to direct the distribution (up to \$100,000) to a charity – without paying federal income taxes.

This has allowed Fr. Joe to be generous to various institutions that have been significant in his life, including Saint Meinrad.

His generosity also extends to a bequest to Saint Meinrad, something that came about after he had reflected on his life. "God has blessed me a whole lot," he says. "I could never have imagined I could have all of this."

As he puts it, it's a way "to say thank you for what has been so important in my life." ♦

Since retiring in 2012, Fr. Joe Ziliak has remained active in ministry. He is serving as the diocese's first vicar for retired priests and is a member of the diocese's communications board and the Priests Retirement Board.

He also assists at several parishes, including St. Benedict Cathedral Parish and Holy Trinity Parish. In addition, he is a member of the Saint Meinrad Alumni Association Board of Directors.

In his leisure time, Fr. Joe plays tennis weekly and enjoys leading tours. This year, he has tours planned to France, Alaska and Italy. And for 2017, he is looking at Peru, the Holy Land, India and a return trip to Italy.

New law allows IRA rollover for charity

For those who are 70½ or older, it is once again possible to make tax-favored charitable gifts from traditional and Roth IRA accounts.

In December, Congress passed legislation making the charitable IRA rollover provision permanent. A total of up to \$100,000 can be transferred directly from traditional or Roth IRAs to a qualified charity, such as Saint Meinrad Archabbey, free from federal income tax each year.

There may also be state income tax savings. Amounts given in this way count toward required IRA minimum withdrawal amounts for the year of the gift.

To make such gifts, it is important to not withdraw funds prior to a gift, but have the gift amount distributed directly from an IRA to one or more qualified

charities. For those with check writing privileges on their accounts, this may be the most efficient way to make gifts directly from an IRA.

The new law makes the IRA charitable rollover permanent, which gives donors who are 70½ or older the option to use the required distribution from their IRA as a charitable gift every year. This is good news for people who wanted to make a charitable gift from retirement assets, but were discouraged from doing so because of the income tax penalty.

Check with the Saint Meinrad Development Office, your IRA administrator or your tax advisor for more information. You can contact the Development Office at (800) 682-0988 or development@saintmeinrad.edu. ♦



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“All gifts to Saint Meinrad are important, but planned gifts ensure that the prayer and work of the monastic community will continue into the future.”

Darren Sroufe,
Director of Planned Giving



Help us carry on God's work.



Your last will and testament can be an eloquent statement of what was most important to you in life. A bequest to help educate priests, permanent deacons and lay ministers at Saint Meinrad is a good way to thank God for your faith and to pass it on to those who follow you.



Saint Meinrad

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