

A new way to help: **PLANNED GIVING**

Bruce Palmieri is a professional financial planner, but deciding how he and his wife Tracy would structure a larger charitable gift was a new experience for him.

“Most people tend to give little gifts at various times throughout life, without a plan,” he said. “When making a major gift, you need to ask yourself, what resonates with my interests?”

For the Palmieris, the answer was easy. Bruce has been a member of the Catholic Charities Planned Giving Committee since 2011, including three years as chair. As a volunteer, he understood the depth and breadth of our programs for people experiencing poverty.

Tracy valued early education. She spent 28 years as the owner and director of a preschool in Baltimore County. Her experience with small children taught her that early education helps them succeed in

life and school. She respected the work of Catholic Charities’ Head Start programs and lauded their impact in disadvantaged communities.

The Palmieris opted for a **DONOR ADVISED FUND**. It allows them to recommend where the funds go, while a third party helps manage and grow the gift. That extends their legacy of giving over years. This approach also made taxes a bit easier for them.

“Catholic Charities does so much for so many. It really does portray the adage, ‘give a man (or woman) a fish and you feed them for a day; teach them to fish and you feed them for a lifetime,’” Palmieri said.

For more on planned giving or whether a donor advised fund is right for you, contact Gen Haines at ghaines@cc-md.org or call 667-600-2014. ■



Bruce and Tracy Palmieri

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