



GENEVA FOUNDATION
of PRESBYTERIAN HOMES

NEWS UPDATE

The Geneva Foundation transforms lives by enriching Presbyterian Homes communities through generous and responsible philanthropy.

LIVING A GENEROUS LIFE

Why do you give? Do you want to make a real difference? Is your generosity a reflection of your values, or a way to inspire others to give? Whatever the reason you support the Geneva Foundation of Presbyterian Homes, it's clear you believe in our mission to provide vibrant communities for older adults that inspire wellness, independence, joy and security.

Because of your connection to the Geneva Foundation, it's natural that you would like our mission to continue well into the future. How? By making a future gift as part of your legacy.

Create Your Legacy at the Geneva Foundation

You can continue your generosity long after your lifetime. Some options include:

- **Percentage giving.** Through your will, you can designate percentages of your estate as you see fit. For example, designate 5% of your total estate to the Geneva Foundation, while leaving 95% to loved ones.

- **Blended giving.** Give an outright gift of cash or other assets today, combined with a future gift, such as naming the Geneva Foundation in your will.
- **Beneficiary designation.** A simple form is all it takes to name the Geneva Foundation as a beneficiary of your retirement plan assets, unneeded life insurance policy or donor advised fund.

Your life's work (and subsequent legacy) is your opportunity to make a statement. Whatever the reason behind your giving, we are here to help you fulfill your goals.

Contact Lisa Schiro, CFRE, Senior Director of Development, at Lschiro@presbyterianhomes.org or 847-979-3922 or with any questions.



LET'S TALK

3 CONVERSATIONS TO HAVE THIS YEAR

Think of the biggest decisions you've made in your life: moving to a new town, making a major purchase, changing jobs, retiring, moving into a Presbyterian Homes community. How many of those decisions did you make only after consulting loved ones, experts or both? Probably most or all of them.

Choosing to include a charitable gift in your estate plan is no exception. For peace of mind, it helps to talk to these essential "team members" as part of the process.

Your Loved Ones

You likely have family members and/or close friends whose input you value. And you may want to provide for them after your lifetime. Balancing that with a desire to help our mission in the future is easier than you may think, thanks to percentage giving.

Conversation Starters

- "Providing for you is one of my top priorities."
- "I also want to help others after my lifetime. That's why I plan to give ___% of my estate to the Geneva Foundation."

Your Financial Planner

Reach out to a trusted advisor to ensure your charitable vision aligns with your financial goals.

Conversation Starters

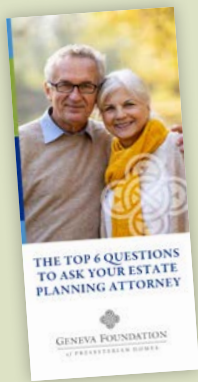
- "I have this charitable goal. How can I make it fit with my long-term financial plan?"
- "What are the best gift vehicles for my personal financial situation?"

Your Favorite Nonprofits

We are always happy to answer your questions. Plus, notifying us about your gift ensures that your wishes are carried out as you intend.

Conversation Starters

- "How will my gift impact the Geneva Foundation's mission?"
- "What are the Geneva Foundation's plans and goals for the future?"



Free Resource

Meeting with your estate planning attorney? Our complimentary guide *The Top 6 Questions to Ask Your Estate Planning Attorney* can help you collect your thoughts beforehand so you can make the most of your time together. Return the enclosed reply card to receive your copy today.

IMPORTANT YEAR-END CONSIDERATIONS

IDEAS JUST AS GREAT TO GIVE AS TO RECEIVE

We know that your decision to support the Geneva Foundation comes from the heart. An added bonus is that your gift may also qualify for a tax break this year when you itemize deductions on your federal income tax return.

Good End-of-Year Planning

Check these off your to-do list to end the year on an organized note.

- **Update your will or living trust.** Review your will or trust for any life change such as a birth, death, marriage or a move to a different state.
- **Review your retirement plan beneficiaries.** Remove any beneficiary on your life insurance or retirement plans who is deceased or is a former spouse, and consider adding a charitable organization like the Geneva Foundation.
- **Review your life insurance policy.** If you have a policy that is no longer a significant piece of your estate plan, consider making a gift by assigning ownership to the Geneva Foundation or making us the beneficiary.
- **Durable power of attorney.** Make sure your durable powers of attorney for financial matters and healthcare are current. A copy of the financial power of attorney should be given to your family members, while a copy of your healthcare power of attorney should be provided to both family members and healthcare providers.

How to Make a Tribute Gift

If you know someone who values the meaningful work we do at the Geneva Foundation, consider making a donation in their honor. These tribute gifts are also a great way to remember loved ones who are no longer with us.

- **Safe-deposit box.** Catalog the contents of your safe-deposit box. Give a written copy to a trusted family member and note any items you are holding for someone else.
- **Bank or brokerage accounts.** Name designated heirs or the Geneva Foundation as a recipient of bank or brokerage account proceeds at your death.*
- **Charitable contributions.** If you've included a gift to the Geneva Foundation in your estate plan, review the details of your gift and let us—and your loved ones—know of your intentions. This will guarantee that your wishes are carried out after your lifetime.

**State laws govern payable-on-death accounts and transfer-on-death accounts. Please consult with your bank representative or investment advisor if you are considering these gifts.*



Who's on Your List?

As we approach the end of the year, we're happy to help ensure that you can support our mission and also get the most benefit. Please feel free to contact Lisa Schiro, CFRE, Senior Director of Development, at 847-979-3922 or Lschiro@presbyterianhomes.org for free resources.

CELEBRATING THE POWER OF COMMUNITY

HOW ONE SPECIAL DONOR ENERGIZED REMARKABLE SUCCESS

In May an anonymous donor presented the Moorings New Hope Scholarship Committee with an incredible challenge! If the committee could raise \$50,000 for their 2021 fundraising campaign, the donor would match all donations dollar for dollar up to \$50,000.

Over the past several years, the scholarship committee had seen a dramatic increase in the number of scholarship applications. While donations to the fund had increased, they have not kept pace with the scholarship requests received, which resulted in limiting awards by 50% for two semesters in 2020.

The committee's goal is to fund scholarships at the maximum level. If they could meet the goal of this matching campaign, the fund would no longer be in a vulnerable position. Thus, they accepted the anonymous donor challenge. Every contribution or pledge made to the Geneva Foundation designated for the Moorings New Hope Scholarship Campaign by July 31st would be matched dollar for dollar.

It was an active campaign with many moving parts, but the Moorings community rallied around the challenge and **raised a whopping \$71,750!** The anonymous donor was overjoyed and so enthusiastic about the response that they decided to increase their contribution and match dollar for dollar all of the amount raised during the campaign. A



gift of \$71,750 was made by the anonymous donor which brought the campaign total to \$143,500.

A "Thank You Reception" was held on August 4th to express gratitude to the Moorings community for reaching this monumental challenge. Congratulations to the Moorings Scholarship Committee on a well-executed campaign. Thank you to the many scholarship friends who contributed to the campaign. Most of all, thank you to the anonymous donor who changed the trajectory of the Scholarship Fund.



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