



Confirmation of Your Legacy Gift to Swiss Village

Legacy gifts help sustain Swiss Village’s mission and programs for future generations. If you have named Swiss Village, Kinder Haus, or the Arthur & Gloria Muselman Wellness Pavilion as a beneficiary in your will, charitable gift annuity, life insurance policy, retirement plan, trust, or other legacy gift, we hope that you will share the good news with us.

The legacy gift record will help us ensure that your wishes are fulfilled, and it will also allow us to honor you as a member of the Bethesda Club, which recognizes individuals who have provided for Swiss Village through their will or as the beneficiary of a legacy gift.

Name: _____ Birthdate: _____

Spouse Name: _____ Birthdate: _____

Address: _____

Email: _____ Phone: _____

Legacy Gift Type:

- Will/Bequest Charitable Gift Annuity Life Insurance Retirement Account Trust
- Other: _____

Use of Legacy Gift:

- Samaritan’s Endowment Unrestricted Funds Kinder Haus Muselman Wellness Pavilion
- Special Purpose Fund Plant Fund Other: _____

(Other use of your gift beyond the 6 funds must be approved beforehand to make sure we can carry out the intent of your gift)

To help us in planning for the future, please provide an estimate of the current value of your legacy gift to Swiss Village. **If provided, all information will be kept confidential.**

Estimate: \$ _____ or Percentage of Estate _____ %

Bethesda Club Membership

Because of your gift we want to invite you to become a member of the Bethesda Club. As a member of the Bethesda Club you will be invited to special events and a thank you dinner along with being recognized in the *Village News*.

- I/We would like to be a member of the Swiss Village Bethesda Club
- I/We would like to remain anonymous and not be listed as a member of the Bethesda Club in publications but wish to receive invitations to special events and Bethesda Club mailings



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This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit Swiss Village in the future and giving us guidance as to your wishes. We recognize that gift plans may change over time, and we hope you will consider notifying us of changes related to Swiss Village. We very much appreciate your expression of support for Swiss Village's mission, programs, and residents. Thank you.

Signature

Signature (spouse)

Date

Will/Bequest Information

Attorney: _____ Firm: _____

Address: _____ Phone: _____

Executor: _____ Phone: _____

Other Legacy Gift Information

Type of Gift: _____ Company: _____

Phone: _____ Policy #: _____

More Information

I would like more information on the following type(s) of giving

Will/Bequest Charitable Gift Annuity Life Insurance Retirement Account Trust

Other: _____

Please send me a copy of *The Village News*, Swiss Village's monthly newsletter

Mail (print version)

E-Mail (online version)

Please return to Jennifer Lehman, Director of Development, at Swiss Village

Mail - 1350 West Main Street, Berne, IN 46711

Email - JenniferL@SwissVillage.org

Telephone - 260.589.4529

Fax - 260.589.8369