

What is a Bequest?

A bequest is a gift through your will. It may be for a specific sum, a percentage, or what is left after you have made bequests to your family. A bequest may consist of cash, securities, life insurance proceeds, real estate and/or personal property.

Advantages to Bequests

- Costs nothing now, yet gives you the satisfaction of knowing you have provided for Swiss Village
- You retain control of and use of your assets during your lifetime
- You may modify your bequest if your circumstances change
- Gifts to Swiss Village from your estate are exempt from federal estate taxes
- Swiss Village will assist with legal fees up to \$75
- If you let Swiss Village know of your plans, we will be able to thank you now and recognize you as a member of our Bethesda Club



CREATING A LASTING LEGACY

Write a Will...Leave a Legacy

What if you could solidify your legacy today by supporting our work tomorrow, all without committing any money now? A gift through your estate can one day help us ensure that residents get the needed care they deserve, equipment and buildings to make life better, along with activities and programming to help make life more enjoyable while at the same time making sure that your loved ones are provided for. Bequests are one of the easiest and most significant ways you can give to Swiss Village. By writing a will you are determining what kind of legacy you will leave. You are making a statement about what is important to you. A gift through a bequest will give to those in need for generations to come.

Funds & Endowments

Unrestricted Fund - allows the Swiss Village Board to determine where funds are most needed and to distribute accordingly

Samaritan's Endowment - helps to provide assistance to residents who, for reasons beyond their control, cannot fully pay for the quality care they need

Kinder Haus Endowment - helps to ensure all children who are part of the program get a solid foundation for life and learning through interim scholarships

Muselman Wellness Pavilion Endowment - helps to offset fixed costs for facilities and equipment

Plant Fund - provides financial assistance to help with the upkeep, updating, and construction of buildings on Swiss Village's campus

Special Purpose Fund - provides staff with scholarships to further their education to be able to provide the best possible care

Jennifer Lehman, Director of Development

260.589.4529

JenniferL@SwissVillage.org

Swiss Village, Inc. Mission Statement

Swiss Village Retirement Community is a not-for-profit corporation committed to providing quality services and affordable facilities in a Christian environment that enhances life with dignity, meaning, and opportunities for growth.

If you choose to direct a bequest to Swiss Village, we encourage you to share your plans with us. Your plans can remain confidential if that is your wish and we are able to ensure that when the time comes, we understand and can abide by your bequest intentions.

Persons wishing to leave property in their estate to Swiss Village, are encouraged to discuss this with our Director of Development beforehand.

We encourage you to discuss all of these options with your financial planner or attorney to make sure this is the correct option for you before making any decisions.



Bequests

Creating a Lasting Legacy

Sample Language for Charitable Bequests

The following provides some suggested methods and wording for remembering Swiss Village in your will.

Specific Bequest: “I give \$___ (or a percentage of my estate) to Swiss Village, Inc., a non-profit Continuing Care Retirement Community in Berne, Indiana.”

Residuary Bequest: “I give a percentage (or all) of the remainder of my estate to Swiss Village Inc., a non-profit Continuing Care Retirement Community in Berne, Indiana.”

Contingent Bequest: “In the event that (primary beneficiary) does not survive me, I give said amount (or percentage) to Swiss Village Inc., a non-profit Continuing Care Retirement Community in Berne, Indiana.”

Designations

Your bequest can be Unrestricted or Restricted. By giving an unrestricted gift you are allowing the Swiss Village Board of Directors to use your gift where it will be most useful.

If your gift is restricted you can choose to designate your gift to any of our established funds. If you desire to leave a restricted gift to a specific project you will need to talk with our Director of Development to discuss your options and if your gift request can be fulfilled.

Established Endowments & Funds:

- Samaritan’s Endowment
- Kinder Haus Endowment
- Arthur & Gloria Muselman Wellness Pavilion Endowment
- Plant Fund (used to upkeep buildings and grounds)
- Special Purpose Fund (used to assist staff in furthering their education to better care for residents)

