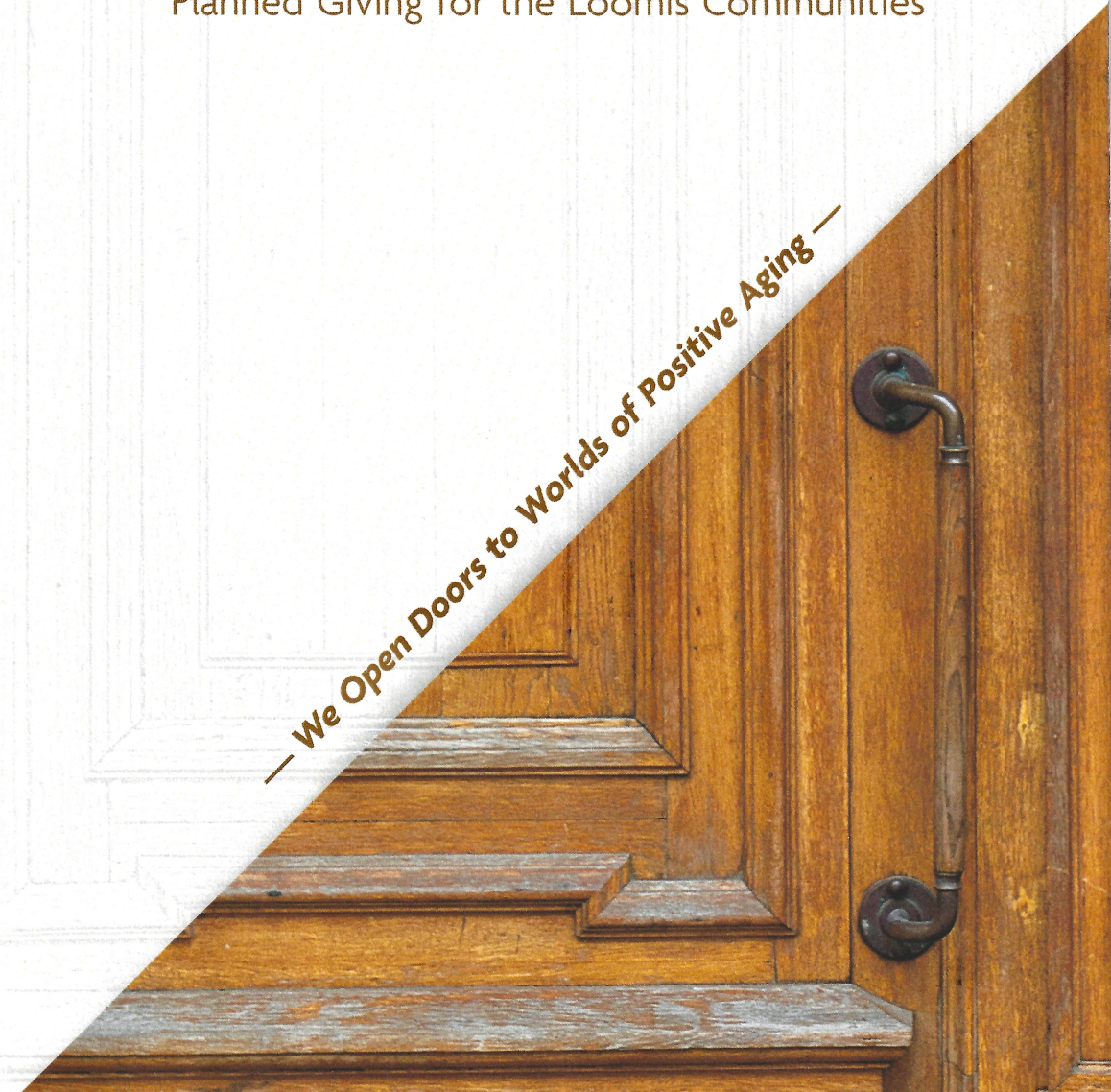




# FOUNDERS SOCIETY

Planned Giving for the Loomis Communities

— We Open Doors to Worlds of Positive Aging —



The Founders Society was created and named in 2005 to honor those Holyoke women – *The Rain or Shine Club* – who sparked a movement in the community to offer a stable and comfortable home for older adults. These women, along with William S. Loomis who donated the land on which the first property opened in 1911, dedicated their time, talents, and financial resources to secure and care for the future of this organization. Like our founders, many others have also cared for our future and planned for tomorrow, which is why The Loomis Communities is here today, and here to stay.



## ***Caring for our future ~ planning for tomorrow***

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Every gift always makes a difference. In the nonprofit world, and that of continuing care retirement communities (CCRCs), there is no substitute for the loyal and annual philanthropic generosity of residents, families, and friends to help ensure that the quality of life and care provided for our residents is always of the highest level, and that the future of our communities is secure. Annual gifts support the financial stability and quality of care and programming for today's residents. But what about tomorrow and future generations of Loomis residents and families? A planned gift can go well beyond just today's needs, providing for a specific future need, endowing a current program or activity in perpetuity, or simply as a hedge against increased future costs and inflation to better manage fees and expenses.

The Loomis Communities has been *opening doors to worlds of positive aging* for over 120 years. That's no accident! It requires great commitment, care, skill, and loyal support. The Loomis Communities is here today thanks to what others have done in the past. The Loomis Communities will be here to provide and care for future generations of residents thanks to what we do today!



# Most popular ways to make a planned gift to The Loomis Communities

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## *During your lifetime*

### **Charitable Gift Annuity**

A Charitable Gift Annuity (CGA) is a contract with Loomis under which you contribute a certain amount of money to Loomis, in return for receiving fixed payments for life. A portion of such a gift is eligible for a charitable income tax deduction for some taxpayers. The minimum donation to establish a CGA is \$50,000. A portion of one's entrance fee refund can also be used to establish such an annuity.

## *After your lifetime*

### **Bequest**

A bequest is a gift from an estate stipulated in a will or trust of specific property, a certain dollar amount, or a percentage of the estate, and there is no minimum or maximum amount or value for a bequest.

### **Entrance Fee Refund Designation**

Loomis residents may designate any portion of their entrance fee refund to be gifted back to Loomis at the end of their time with us.

### **Beneficiary Designation**

You can designate Loomis as beneficiary of some assets such as retirement plan benefits, IRAs, life insurance, and brokerage accounts. A separate beneficiary form is required with the custodial institution of the asset to make such a designation.

## **Planned and Estate Giving**

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Planned Giving is the process of making charitable contributions to organizations important to you to take effect either during your lifetime or upon your death as part of your overall financial or estate plan.

Some planned gifts may require the professional assistance of an attorney or financial advisor. Whether as simple as a bequest in your will, or a more complex charitable vehicle, planned gifts have, and will continue to have, the greatest impact on the future of The Loomis Communities.



# Founders Society

Membership for the Founders Society includes those individuals, living and passed, who made their intentions known of a planned gift to The Loomis Communities either during or after their lifetimes in order to secure both their own legacy and our future. Anyone can become a member of the Founders Society, requiring only a signed form of the intention, a few additional details, and some corroborating paperwork, if necessary. You can begin the process by returning the reply card included here with these materials.

Members of the Founders Society gather regularly to be recognized during their lifetimes, to share their stories, and to invite other Loomis Communities residents and friends to consider membership as well. Founders Society members are invited to attend a number of special events throughout the year, and receive a variety of additional benefits.

## Contact

For more information about membership in the Founders Society and how you can help plan for tomorrow by making a gift that provides for our future today, please complete and return the information card enclosed, or contact the Director of Development and Community Engagement or Chief Executive Officer at 413-532-5325.



### John Anz

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