

*When caring and
dedicated people
come together,
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For generations, McKendree Village has ministered to seniors, providing high quality retirement and health care in a Christian environment. By remembering the McKendree Village Foundation in a planned gift, you can support the vital ministry of Tennessee's largest continuing care community. The Legacy Society is a very special group of people who have made plans to support McKendree's ministry for generations to come through a planned gift. When caring and dedicated people come together, amazing things are accomplished!



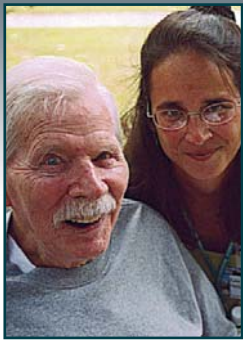
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On the Web: www.mckendreefoundation.org



Legacy Society

A society to honor individuals who believe in the ministry of McKendree Village and who support it through planned giving. In addition, your planned gift to McKendree Village Foundation can provide current or future income and benefits to you and loved ones.



Your planned gift naming the McKendree Village Foundation as a beneficiary qualifies you for membership in the Legacy Society. Your gift may be designated for the Foundation's general fund or can be earmarked to an area of special need and interest of the donor. These might include:

- The Benevolent Care Program. The needs of McKendree Village residents who are outliving their personal resources are being identified and met everyday through loving, Christian outreach.
- Capital Needs Fund. On an ongoing basis, McKendree Village is challenged to keep our facilities up to date and to meet the diverse and expanding needs of an increasing senior population.
- Pastoral Care Endowment Fund. Dedicated to enhance the spiritual support of residents, staff and residents' families by providing an expanded pastoral care staff and programming.
- Endowment Fund. The principal remains untouched and McKendree Village receives income each year to support vital programs. Endowment gifts may also be undesignated, allowing McKendree to focus on the areas of greatest need at the time, or can be earmarked for specific programs.

If you have or plan to include McKendree Village in your estate plans, please contact us so that we may include you in this special group of McKendree supporters. There are a variety of planned gift options, any one of which qualifies you for Legacy Society membership, including:

- Retained Life Estate
- Wealth Replacement Trust
- Charitable Gift Annuity
- Pooled Income Fund
- Bequests
- Insurance beneficiary
- IRA beneficiary
- Charitable Lead Trust
- Charitable Remainder Trust

The McKendree Village Foundation is happy to provide you with additional information on these opportunities.

Retained Life Estate

One of your valued possessions, your home, can become a valued gift to us. A retained life estate allows you to remain in your home during the rest of your life and, if you so choose, your spouse remains for life.

Charitable Gift Annuity

The concept of the charitable gift annuity in America dates back to 1843, when a merchant in Boston first donated a gift of money to the American Bible Society in exchange for a flow of income. Today, the concept includes valuable tax benefits for donors. But perhaps more valuable than the financial advantages is the satisfaction donors gain by helping to continue our mission and good works.

Bequests

Leave your legacy by making a gift in your will to friends, family and charitable organizations. A bequest is one of the simplest ways to remember those you care about most.



Charitable Remainder Trust

While there is no single way to achieve all of your personal and financial goals, a charitable remainder trust can help you achieve many of your goals. In the right circumstances, this plan can increase your income, reduce your taxes, unlock appreciated investments, rid you of investment worries and ultimately provide very important support to a charitable organization.

Charitable Lead Trust

If your goal is to provide an inheritance for your children, but you would also like to make a significant charitable gift through your estate, find out how a charitable lead trust can help you satisfy both objectives.

Wealth Replacement Trust

Perhaps you would like to make a sizable contribution to us now to help meet our current needs, but you don't want to reduce the estate you will pass to your family. The solution? Purchase life insurance to replace the assets you give to a charity.

Pooled Income Fund

When you contribute to the pooled income fund for our organization, you receive an income for the rest of your life, as well as a current income tax deduction. You make a meaningful gift to us—a gift that also gives back to you.

Insurance Beneficiary

You can transfer a paid policy to McKendree Village Foundation, or name us as a partial beneficiary of an existing policy. You can also purchase life insurance, name us the beneficiary and begin paying premiums. If you purchase life insurance and make McKendree Village Foundation the owner and beneficiary of the policy, you can deduct the premiums as a charitable gift as you make them.

IRA Beneficiary

You can avoid being taxed twice on IRAs by naming McKendree Village Foundation as the beneficiary of the remainder of your retirement assets after your lifetime.

The Legacy Society is comprised of a select group of friends of McKendree Village who have made provisions in their financial and estate planning for the ministry of McKendree Village. The society was created because too often McKendree learns of an estate designation too late, preventing us from thanking donors and sharing with them the life-changing impact of their gift.

Legacy Society members are invited to a special dinner each year in recognition of their commitment to the future of McKendree Village. In addition to the annual Legacy Society celebration, members are recognized through an attractive display at McKendree Village and in the McKendree Village annual report.



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