

Charitable Bequest Plan

A legacy to your faith

Support for church and charitable causes is a natural part of life for those who believe in the biblical concept of stewardship. A bequest plan with Mennonite Foundation can help you witness to your faith even after your death and may also help you reduce estate and inheritance taxes.

How it works

When making a will or living trust, most people are concerned about dividing their assets among family members. Mennonite Foundation suggests you also consider making Henri Nouwen Society part of your estate planning.

Simply indicate in your will that a portion of your assets should be left as a bequest to Mennonite Foundation. Then fill out a charitable gift recommendations form that allows you to recommend what charitable causes you would like to support with your bequest.

Upon your death, the executor of your estate will transfer your bequest to Mennonite Foundation. We then distribute the assets to approved charities you have recommended. Another option for large bequests is to ask Mennonite Foundation to hold the funds, invest them for a certain period, and then distribute only the net income

to Henri Nouwen Society. This multiplies the effect of the gift over a period of time. This service is available for a nominal fee.

How to give a gift

The first step is to decide on the share you wish to designate for Henri Nouwen Society. We suggest you use percentages or shares rather than specific dollar amounts.

When children are young, parents often choose to designate a tithe (10 percent). As children grow up, parents may want to increase the share designated for charity. One option is to adopt Henri Nouwen Society as another child with an equal share. If you have no children or if your children are independent, you may wish to designate an even larger portion to Henri Nouwen Society. We suggest you let need be a major factor in deciding how much of your estate should be given to family and how much to charity.

Once you have decided on the share or percentage, fill out a charitable gift recommendations form from Mennonite Foundation. The form is used for the bequest to Mennonite Foundation and to designate Henri Nouwen Society as the charity you want to support. You may revise your distribution recommendations at any time by simply filling out a new distribution form and sending it to Mennonite Foundation.

Advantages

- **Simplify your estate.**
- **Support your selected charities with a single bequest.**
- **Revise distributions without changing your will.**
- **Reduce estate and inheritance taxes.**

Henri Nouwen Society

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SOCIETY



What Henri Nouwen Society receives

Charitable organizations depend on the contributions made by donors like you. Henri Nouwen Society is pleased to receive contributions through a bequest plan. Our survival often depends on contributions like these.

What you receive

You may be able to reduce estate and inheritance taxes since charitable bequests are deductible from your estate.

A bequest plan through Mennonite Foundation simplifies matters for the executors of your estate since they only have to send the bequest to one organization no matter what charities you choose to support. The foundation takes care of the distribution of the funds.

Perhaps the greatest benefit is the satisfaction of knowing that the support you have given to Henri Nouwen Society in life will continue at your death. Even if you do no other type of planned giving during your life, you can participate in the work of the church with a charitable bequest. It is the one form of planned giving everyone can do.

Case studies

As a hypothetical example, Jane and David Jones are in the process of revising their will. They have been regular contributors to the Henri Nouwen Society and avid readers of Henri's books, and profoundly touched by *The Wounded Healer*. Because they still have two young children, they decide to designate 10 percent of their estate to the Henri Nouwen Society by using a Mennonite Foundation bequest plan. Should both of them die, 10 percent of their estate will be given to Mennonite Foundation. The foundation will then distribute the funds to the Henri Nouwen Society upon review and approval of the charitable gift recommendation form.

Chris and Lyla Smith have three adult children who are self-supporting. They decide to divide their estate into five equal shares: one share will go to each of their three children, one share to their local church and the fifth share to the Henri Nouwen Society. Upon their deaths, the money from the fifth share will go to Mennonite Foundation, which will then distribute the funds to the Henri Nouwen Society as recommended in a charitable gift recommendation form.

Act today!

For more information, contact Colette Halferty from Henri Nouwen Society at (866) 226-2158 or Nikki Shingle from Mennonite Foundation at (717) 653-6662.

We'll show you exactly how you can use a bequest plan to continue your legacy of stewardship even after your death.

Legal language suggestions

The bequest may be worded something like the following:

I give, devise, and bequeath to The Mennonite Foundation Inc., a not-for-profit corporation organized under the laws of the State of Indiana, with headquarters at 1110 N. Main St., Goshen, Ind., (____) percent of my estate (or name of a particular property) for its general purposes.

Or, after shares have been designated to family members, the bequest may say:

All the rest, residue, and remainder of my estate, both real and personal, wherever situated, I give, devise, and bequeath to The Mennonite Foundation Inc., a not-for-profit corporation organized under the laws of the State of Indiana, with headquarters at 1110 N. Main St., Goshen, Ind., for its general purposes.

Gift plan services for the nonprofit are offered through the unaffiliated entity of Mennonite Foundation.