



## *How to give . . .*

The Nebraska Masonic Home Foundation will assist you with your gift for The Masonic Home.

When you are ready to make a gift . . .

1. Talk to your financial advisor and your attorney to decide what to give and how you want to give it.
2. Contact Jo Peters at (402) 296-7334. She will help you to complete the giving process.
3. Please let other Masons know about the benefits of giving.



The Nebraska Masonic Home Foundation  
1300 Avenue D  
Plattsmouth, NE 68048

Jo Peters, Foundation Director  
(402) 296-7334  
[jpeters@nemh.net](mailto:jpeters@nemh.net)

# *Your gift . . .*



# *Makes a difference.*

*Your gift . . . to the  
The Nebraska Masonic Home  
will make a significant  
difference in the lives of our  
residents.*

**Caring Club:** A cumulative gift of \$250 or more made from September 1<sup>st</sup> through August 31<sup>st</sup> entitles you, the donor, to be recognized as a member of The Caring Club.

**Gifts of Cash:** Every dollar you give outright to support our charitable work is tax deductible. Cash gifts are as easy as writing a check and specifying how/where you want it used. Payments can be made over a period of 3-5 years.

**Gifts by Will or Trust:** You can name The Foundation to receive assets in the future from your estate. These gifts do not change your current lifestyle and leaves your current financial planning unchanged. These gifts take effect only after your other obligations have ended.

**Gifts from Retirement Accounts:** You can name The Nebraska Masonic Home Foundation as a beneficiary of your 401K, IRA or other type of retirement account. This will avoid the potential double taxation of the estate tax and income tax that your heirs would pay.

**Gifts of Appreciated Assets:** Transfer stocks, bonds or mutual funds that have appreciated in value to The Nebraska Masonic Home Foundation. The Foundation then sells your appreciated assets and uses them to further its Mission. You receive an income

tax charitable deduction based on the fair market value of the asset on the date of transfer no matter what you paid for it.

**Gifts of Real Estate:** The Foundation will also accept gifts of real estate under certain circumstances.

**Bank Accounts and CD's:** Though not considered appreciated assets, bank accounts and certificates of deposit can also be easily transferred to The Foundation.

**Gifts of Life Insurance:** The use of life insurance policies to make your gift to support the residents can be done without having to reach for your checkbook. Simply name The Foundation as the primary beneficiary of an existing policy; you continue to pay the premium to enhance the endowment fund; name The Foundation as sole revocable Beneficiary of a group term life insurance in excess of \$100,000 or assign your annual dividends on your policy to The Foundation.

**Charitable Trusts:** The use of charitable trusts can provide income to you plus an income tax deduction.

- **Charitable Remainder Unitrust**  
Securities or other appreciated assets are transferred to a Unitrust. A percentage of the principal is paid to The Foundation until the trust terminates. At that time the remaining principal is paid to The Nebraska Masonic Home Foundation.
- **Charitable Remainder Annuity Trust**  
Securities and other appreciated assets are transferred to the Annuity Trust. The Trust pays a fixed rate of income to you or to your beneficiaries. When the trust terminates the remaining principal is paid to The Nebraska Masonic Home Foundation.

You will receive income for life or a specified number of years with the Unitrust and Annuity Trusts.

- **Charitable Lead Trust**  
Securities and other appreciated properties are transferred to the Lead Trust. The Lead Trust pays the income to The Nebraska Masonic Home Foundation for a specified period of time. The remaining principal is paid to your heirs.

*Please consult with your tax preparer or your attorney for assistance when making one of the above mentioned gifts.*

**The Tree of Life:** The Tree of Life permits you, the donor to make a \$2,500 or larger gift and add a leaf and/or base stone to the tree. The gift can be made in honor or memory of someone or as an expression of gratitude.

Funds from The Tree of Life are placed in an investment account and restricted for partial or fully subsidized payment for the monthly Resident Service Fee of those residents whose funds have been depleted.

**George W. Lininger Society:** By naming The Nebraska Masonic Home as a beneficiary of a planned gift in your estate plan you will become a member of the George W. Lininger Society. Letting us know you have done this allows us to personally thank you and to recognize your generosity. You will be an inspiration to others.

*Thank you, for  
making a difference.*