#### Fall 2023

#### WESTMINSTER COMMUNITIES FOUNDATION

# **Foundation Focus**

Enhancing Today, Securing Tomorrow

### What Is Your 'Why'?

"Why" is a word that drives us.

It does more than ask a question—it defines a connection, a relationship. Why do we love the people we love? Why do certain sights, sounds and smells stir our souls? Why do we aspire to lead happy, healthy and purposeful lives?

The answer always comes with a story. It's the best part about "why."

The relationship you have with Westminster Communities is driven by your unique "why." There may be a deeply personal reason you care so much about those we serve, a story that compels you to help us support our friends and neighbors.

That story also reinforces your values. A deep sense of community, serving others, preserving independence aren't important to you by accident. They have a source—an inspiration—and they connect you to Westminster on a personal level: *I value what you value. Your mission is my mission, too. I want to see this work carry on for generations.* 

This is what makes your relationship with us so special. You share our values and invest in the longevity of our mission.

Your "why" and our "why" are the same. Your story and our story are connected.

With a legacy gift to Westminster Communities Foundation, you can carry on our shared values beyond your lifetime. Together, we can ensure those who come after us will continue to enjoy happy, healthy and purposeful lives for generations to come.

#### **Preserve Your Values**

A legacy gift is a meaningful way to share your love, and it is simpler than you might think. A few words in your will, a short form, a phone call—all are ways you can make a profound difference. We'd love to help! Contact your community's Foundation representative or reach out to our main office at 407-839-5050 or jcoates@wservices.org. You can also learn about which gift options might be best for you at **westminstercommunitiesfl.org/foundation**.



#### Simple Ways to Leave Your Legacy

We all have values and beliefs that guide our lives. Share these with your loved ones by creating a legacy letter. Get started today with *7 Questions to Help Build Your Legacy*. If you want to make an enduring impact at the Westminster Communities Foundation, learn about the benefits of a gift of life insurance in our brochure, *Gifting Life Insurance*. Complete and return the enclosed card today to get your FREE copies.

## It's Not Just a Policy. It's an Opportunity

#### Consider This Impactful Option for Your Life Insurance

Do you still need your life insurance policies to provide security for your loved ones? If not, you can use one to make a simple and powerful impact on those we serve.

#### Why Give a Gift of Life Insurance?

#### 1. It's Tax-Beneficial.

For an existing policy, you may receive a federal income tax charitable deduction when you itemize. For a new policy, with the Westminster Communities Foundation named as the owner and beneficiary, your premium payments may be deductible as charitable gifts.

#### 2. It's Secure and Confidential.

If you make the Foundation the owner and beneficiary of the policy now, it will not be included in your probate estate and will remain confidential.

#### 3. It's Cost-Efficient.

Life insurance allows you to make a significant gift even if your means are limited today. By making small premium payments each year for a limited number of years, you can leave a gift of sizable proportions.

#### How to Give a Gift of Life Insurance

Name us as a beneficiary. Contact your administrator, or go to your provider's website, for a change-of-beneficiary form and indicate the percentage you'd like the Foundation to receive after your lifetime. If you tell us about this gift, we can ensure it is used exactly as you intend.

**Donate an existing policy or take out a new policy.** Name the Foundation as the owner and the beneficiary of the insurance contract. If you choose this option, let us know so we can work with you and your insurance agent to help implement your gift.



80 W. Lucerne Circle • Orlando, FL 32801 (800) 948-1881 • (407) 839-5050

#### www.westminstercommunitiesfl.org/foundation

If you wish to be removed from our fundraising mailing list, please contact Hyacinth Mayberry by email at hmayberry@wservices.org or toll free at (800) 948-1881.

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL FREE (800) HELP-FLA (435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE. THE REGISTRATION NUMBER IS SC-10691 AND 100 PERCENT IS RETAINED BY THE CHARITY. © The Stelter Company | Information contained herein was accurate at the time of printing. The information in this publication is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in any examples are for illustrative purposes only. References to tax rates include federal taxes only and are subject to change. State law may further impact your individual results.