



GENEVA FOUNDATION

of PRESBYTERIAN HOMES

NEWS UPDATE

THE GENEVA FOUNDATION TRANSFORMS LIVES BY ENRICHING PRESBYTERIAN HOMES

COMMUNITIES THROUGH GENEROUS AND RESPONSIBLE PHILANTHROPY.

Their Strength Came from Faith, Family, Friends and ... the Cubbies

Avid Cubs fans, Tom and Marilyn Adams were a faithful couple who deeply valued their family and their community at The Moorings. Tom Jr. notes that his parents “**felt very grateful and blessed for the comfort, security, care and friendship provided at The Moorings. They always felt honored and very fortunate to be part of an organization and community of such high standards and wonderful people.**” The Adams’ generous decision to include the Geneva Foundation in their estate plan with a specifically designated bequest to The Moorings Employee Appreciation Fund reflects the special place their devoted care givers held in their hearts.

Both born in 1934 — the year the Cubbies finished third in the National League — Tom and Marilyn lived a life full of blessings that they received and extended to others. They even got to see the Cubs win the World Series once! The couple is remembered with abounding love by their daughter, two sons, six grandchildren and seven great-grandchildren.

Marilyn created full Thanksgiving dinners with all the fixings for her whole family entirely from scratch and never missed listening to Handel’s Messiah every Christmas. She is well known and deeply appreciated for her decades-long years of service at MacArthur Elementary. Tom came from a very modest background in rural Indiana and was a triplet. His



Marilyn and Tom Adams

number one objective was always to provide for his family. To that end, he worked at O’Hare airport — first for TWA and then American in the stockroom for over 45 years.

Since 1988, Tom and Marilyn supported all charitable aspects of Presbyterian Homes and the Geneva Foundation. The couple made gifts benefiting this non-profit organization’s benevolent mission helping to ensure that residents with diminished means can remain in its care. They have been loyal donors to The New Hope Scholarship Fund for The Moorings’ employees seeking to further their education, improve their skills and apply for citizenship. The Adams’ giving culminated in their generous bequest to The Moorings Employee Appreciation Fund. This summer, the family will place a commemorative bench at The Moorings in blessed memory of Tom and Marilyn Adams. No doubt the Cubs will have a winning season in their memory as well!

Inside:

A Gift in Your Will: How to Talk About It ■ Coming Soon: Tax Code Changes ■ A Perfect Way You Can Honor Someone Special



A Gift in Your Will: How to Talk About It

Choosing to include a charitable gift in your will or estate plan is a big decision. Give yourself peace of mind during the process by talking to these essential people:

Your Loved Ones

Discussing your charitable goals with family and friends is better than the alternative — important people in your life left confused and angry after you are gone.

Conversation Starters

- “Providing for you is one of my top priorities. I also want to help older adults enjoy wellness, independence, joy and security after my lifetime.”
- “It’s important that you know what causes I want to support because they are an extension of my values and hope for the future.”

Your Estate Planning Advisor

You should find a reliable expert to ensure you choose a gift that makes a difference while aligning with your finances.

Conversation Starters

- “I want to support the Geneva Foundation of Presbyterian Homes in my will. How can I make a gift fit with my long-term financial plan?”
- “What are the best types of gifts for my financial situation so I can protect my loved ones *and* support the Geneva Foundation after my lifetime?”

Your Favorite Nonprofits, Like the Geneva Foundation

We would be happy to listen as you explain how you would like to make an impact — then work with you to turn your hopes into reality.

Conversation Starters

- “I’m considering leaving a gift to the Geneva Foundation in my estate, but how can I be sure that gift will be used wisely?”
- “How is the Geneva Foundation set up for success so it can keep fulfilling its mission for a long time to come?”



Coming Soon: Tax Code Changes

What They Mean for Your Giving

You may have heard about certain tax laws “sunsetting” this year and wondered what was up. Here’s a brief Q&A to shed some light:

Q What is the Tax Cuts and Jobs Act?

A That 2017 law overhauled the tax code. It changed tax brackets and increased the standard deduction, the estate tax exemption, the child tax credit and more. It took effect January 1, 2018, but many benefits are due to expire at the end of this year.

Q Will some of its benefits be renewed?

A Possibly. It’s up to Congress to decide what stays and what goes. If no action is taken by December 31, 2025, the tax laws will revert to what they were in 2017.

Q What does this mean for my charitable giving?

A Three words: Stay the course. Your options for giving — both now and in the future — remain unchanged. Don’t wait for new tax laws and lose an opportunity to make a difference at a nonprofit you love and possibly enjoy tax benefits, too.

Q Which gifts should I consider?

A You can choose from several popular options:

- A gift in a will or trust
- Beneficiary designations
- Gifts from your IRA
- Gifts of appreciated property
- Donor advised funds

Q If I need more information, who should I talk to?

A For guidance on how new laws could affect your finances or tax bracket, talk to your financial advisor or tax attorney.

For guidance on the best ways to leave a legacy at the Geneva Foundation of Presbyterian Homes anytime this year, reach out to Lisa Schiro, CFRE at Lschiro@presbyterianhomes.org or 847-979-3922. We can help explain the options available to you regardless of what happens in Washington, D.C.

A Perfect Way You Can Honor Someone Special

On your life's journey, who has inspired you?

Few of us find success and happiness on our own. We rely on the encouragement of others, including family, friends and mentors. Maybe some of these special people even connected you to the institutions you cherish today.

If someone in your life inspired your passion for creating vibrant communities for older adults, what better way to honor them than by attaching their name to something that will celebrate their legacy of kindness?

Create a tribute gift to the Geneva Foundation of Presbyterian Homes in your special person's name and you will:

1. Publicly honor the important role they played in your life.
2. Further our mission of enriching the lives of our residents and their families.
3. Possibly enjoy tax benefits.

You can give the Geneva Foundation a gift in someone's honor today or in the future:

- A gift today could fund our immediate needs or an upcoming project, giving you and your hero, if they are still living, a chance to see your generosity in action.
- Through a future gift, like one in your will or through a beneficiary designation, you can honor your inspiration without affecting your finances today.



How Can You Start Honoring Your Hero?

Our FREE guide, *Give From the Heart With a Tribute Gift*, shows you how to put your feelings of gratitude into action, providing details on many gift options you have. The guide even explains a way you can honor your special person forever!

Request your FREE guide today to learn more. Simply complete and return the enclosed reply card.



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If you wish to be removed from our mailing list, please contact Lisa Schiro, CFRE, by email at Lschiro@presbyterianhomes.org.

Yes, I Want to Honor Someone Special

Please complete and return this reply card in the enclosed envelope today.

- I am interested in including the Geneva Foundation in my estate plan.
- I've already chosen to include a gift to the Geneva Foundation in my estate plan but haven't yet notified you.

Thank you for supporting our mission to create vibrant communities for older adults that inspire wellness, independence, joy and security — enriching the lives of residents and their families.



- Please send me the FREE guide ***Give From the Heart With a Tribute Gift.***

Name (Please print.)

Email

Telephone

Address

City, State ZIP

GENEVA FOUNDATION
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