

Thoughts to Consider:

- The Marquette Manor Foundation welcomes large philanthropic contributions to achieve its mission. We may attach the donor's name to a portion of a Marquette building, a section of its grounds, or to a program to recognize exceptional generosity.
- You and your attorney should review your Will every five (5) years.
- THE LEGACY SOCIETY gratefully recognizes those who include The Marquette Manor Foundation with planned gifts in their estate plans.
- The Bernard L. Strange Society recognizes those who donate \$1000 or more each year by placing their names on a plaque displayed outside the entrance to Foundation Hall.
- Donations to The Foundation may designate a specific purpose or be unrestricted. One such project in the past renovated the Pavilion's courtyard.
- Donors are advised to consult with their tax advisors to determine allowable deductions for any gifts to The Marquette Manor Foundation.



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Please Know Your Gift Matters:

"It is enormously comforting to know that at my mother's age and with the exhaustion of her financial assets, her future at Marquette is provided for. My heartfelt thanks for agreeing to assist my mother and to ensure she can continue to enjoy the high standard of care that Marquette provides."

-Her Son

Sue and Guy Miller admire the inside plaque for the courtyard renovations funded by Bernice Davey's Bequest. **The plaque reads "This courtyard was made possible by a gift from Bernice Davey to the Marquette Manor Foundation."** Ms. Davey remembered the Marquette Manor Foundation in her estate.



THE MARQUETTE MANOR FOUNDATION

Helping to Ensure Marquette's
Continued Success and Stability



The Marquette Manor Foundation

is a nonprofit corporation exempt from federal taxes under section 501c(3) of the Internal Revenue Code and contributions are tax deductible to the extent provided by law.

Purpose

To financially assist residents (Benevolent Care) whose funds have been partially or wholly exhausted because of illness, inflation, or longevity.

Vision

The Foundation was conceived as a means to provide funds that will benefit all residents of Marquette either directly or indirectly.

- The Marquette Manor Foundation is a separate entity with its own management, financial accounts and investments.
- The Marquette Manor Foundation is a source of funds whereby residents in need confidentially request supplemental financial assistance. The dignity of each person is jealously protected.



"Quality programs, interesting extra-curricular activities, competent staff, great food and a diverse community encourage developing friendships."

"We really need more Endowment Funds... Why? Residents move here for security and peace of mind. A strong endowment helps reassure residents they will always have the highest level of care."

-Michael McGinley

Need:

With the increase in the cost of living and rising medical costs, the need to increase the endowment grows each year. Annual costs for Benevolent Care at Marquette reached \$450,000 in recent years. The Foundation has provided only 40% of each year's need. It is the goal of The Foundation to fund the entire expense of Benevolent Care. Attaining this goal would benefit all residents.

Ways to Support The Foundation:

- Cash Gifts
- Securities
- Matching Gifts
- In Memory/In Honor of
- Wills and Trust Distribution
- Gift Annuities
- The Charitable Remainder Trust
- Insurance Policies (Paid-up)
- Tangible Personal Property (jewelry, antiques, automobiles)
- Gifts of Real Estate (rental property, farm, lake property)
- Gifts from IRAs
- Designate a percentage of your "Return of Capital Agreement" with Marquette to the Foundation.

Accountability:

- The Marquette Manor Foundation Board of Directors is composed of thirteen men and women, three of whom are residents.
- The Executive Director of Marquette informs the Board of current and projected benevolent care expenses.
- The MMF Board meets quarterly.
- An outside CPA firm conducts an annual financial audit.
- A professional consulting firm advises the Board on investment policies.
- Tax form 990 is filed with the IRS.
- Three (3) members of the Marquette Board (RLI) confidentially review all requests for Benevolent Care.

- **The Foundation has provided over \$3,000,000 for residents who have outlived their financial resources.**
- **The Foundation maintains an Endowment balance adequate to assure fiscal responsibility.**

