

About The Marquette Manor Foundation

The Marquette Manor Foundation’s commitment to the promise of Supporting Residents in Need is reinforced by our two-fold purpose:

- **To financially assist residents** whose funds have been partially or wholly exhausted because of illness, the economy, longevity, or unforeseen changes to their financial circumstances.
- **To foster, fund, and promote** special artistic, educational, musical, or recreational projects or facilities that enhance quality of life at Marquette.



The Marquette Manor Foundation has provided more than \$600,000 toward special projects like renovations to the Health Care Center courtyard adjacent to the Bernard L. Strange Pavilion and the purchase of a new bus to transport residents for off-campus activities.

Resident fees cover the daily expenses of Marquette’s operations. Generous contributions to the Marquette Manor Foundation help ensure the availability of funds to support benevolent care. Marquette Manor Foundation, Inc. is a separate entity from Marquette (Retirement Living, Inc.) with its own management, financial accounts, and investments.

The Marquette Manor Foundation Board of Directors is responsible for upholding the values that make it a valued resource to Marquette’s residents and ensuring it is accountable to its donors and beneficiaries.

- Three members of the thirteen-member board are residents.
- One Foundation Board member is appointed to serve as the Foundation’s representative on the Marquette RLI Board of Directors, and one member of the RLI Board is appointed to represent Marquette on the Foundation Board.
- The Marquette Manor Foundation Board meets quarterly.
- Three members of the Marquette RLI Board confidentially review all requests for benevolent care. Identity is protected from application to approval.
- At its Board’s discretion, the Foundation may make modest allocations for projects that enhance the quality of life for all Marquette residents.
- The Foundation utilizes a leading local professional investment advisory firm to grow the endowment.

On behalf of grateful residents and their families, please know your gifts to The Marquette Manor Foundation matter. Through your generosity, we are able to keep our promise to residents that they will remain at Marquette when circumstances beyond their control create the need for assistance.

“While in independent living, my mother’s revenues from my father’s pension and Social Security were initially sufficient to ensure she could pay her way at Marquette. Beginning in the mid-2000s, she had to dip into her savings and investments to meet her monthly charges, and she exhausted those assets. It was certainly a relief to know that Marquette was willing to assist my mother and others who reach that stage, allowing them to continue residing at Marquette. My heartfelt thanks!”

The Son of a Former Resident

For more information about making a charitable gift to The Marquette Manor Foundation, benefiting your neighbors and our Marquette community, the Foundation Executive Director’s contact information is listed below.

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



MARQUETTE MANOR
FOUNDATION

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THE FOUNDATION



MARQUETTE MANOR
FOUNDATION

Supporting Residents in Need
and Enhancing the Quality of Life at Marquette



Peace of Mind

When residents become part of the Marquette community, they feel welcomed and secure, knowing they will always be able to remain at Marquette, even if they outlive their resources or face unforeseen financial circumstances.

The Marquette Manor Foundation and Marquette Retirement Living, Inc. (RLI) provide a safety net to the community’s residents by honoring the promise of benevolent care made possible by the philanthropic giving of Marquette’s residents, their friends and families, Board members, and other donors to the Marquette Manor Foundation.

The Care Fund

In recognition of that generosity, the Foundation has renamed its annual fund to **The Care Fund** — a reflection of the impact of donor support for benevolent care. **The Care Fund** embodies the kindness and charity of donors who wish to make a positive impact through their annual giving.

The Marquette Manor Foundation has provided more than \$4 million in grants to support Marquette’s residents who have outlived their financial resources. This dual commitment of The Marquette Manor Foundation and Marquette RLI gives all residents peace of mind knowing they will be able to continue to live at Marquette even if their personal funds become exhausted.



The Marquette Manor Foundation gratefully acknowledges and thanks our annual donors to **The Care Fund**, which supports benevolent care primarily from year-end appeals, sustaining (monthly), honor, and memorial gifts, as well as from investment fund earnings.

Even as the cost of living and medical costs continue to rise, requests for benevolent care support may vary according to individual circumstances. In 2016, for example, the funded amount exceeded \$400,000, in 2021 it was just over \$360,000. The Marquette Foundation funds a portion of requests each year through quarterly grants to Marquette RLI. The Foundation desires to fund the entirety of annual benevolent care needs and seeks increased support through annual, major, and planned or estate gifts.

The Care Fund

The Marquette Manor Foundation has rebranded and restructured its annual giving program to recognize our residents for their generous support. The Donor Recognition Chart lists **The Care Fund** ranges for recognition and the benefits accorded to donors in those categories.

Donor Recognition Benefits	The Care Fund of Marquette Manor Foundation — Giving Levels						
	The Bernard L. Strange Society						
	\$10,000 and above The Pinnacle Circle	\$5,000 and above The Visionary Circle	\$1,000-\$4,999 The Patron Circle	\$500-\$999 Caring Champions	\$250-\$499 Caring Advocates	\$100-\$249 Caring Boosters	Up to \$99 Caring Supporters
Personalized folio for important documents (presented upon joining the Pinnacle or Visionary Circle of the Bernard L. Strange Society)	◆	◆					
Invitation to a business lunch with executive directors of Marquette and the Marquette Manor Foundation	◆	◆					
Invitation to the annual Bernard L. Strange Society Luncheon	◆	◆	◆				
Invitation to a Donor Recognition event	◆	◆	◆	◆	◆		
A Marquette Manor Foundation notepad	◆	◆	◆	◆	◆	◆	
Listing in <i>The Image</i> Newsletter	◆	◆	◆	◆	◆	◆	
Listing in Annual Report	◆	◆	◆	◆	◆	◆	◆

Sustainers are monthly donors whose consistent giving enables long-term planning to fulfill the Caring mission of the Foundation. They are recognized within their giving categories with an asterisk following their names.

Appreciating Donors

In addition to **The Care Fund**, the Foundation recognizes donors whose one-time major gift merits the opportunity to have a specific area of the campus or dedicated area of a building named in honor of the donor or their honoree. (See the *Naming Opportunities* brochure.)



Individuals and couples wishing to include the Marquette Manor Foundation in their estate plans are encouraged to speak to the Foundation Executive Director for more information on signing a brief, non-binding Statement of Intent. They are warmly welcomed to The Legacy Society, recognized with other members on signage near the Foundation Office and receive an invitation to a special annual function.

WAYS TO GIVE

How You Can Make an Impact — and Potentially Realize Tax Benefits — Through Your Giving

Cash Gifts and Securities

Donors often prefer giving cash and securities to provide immediate funds to The Marquette Manor Foundation — and therefore immediate outcomes that benefit Marquette residents. Both types of gifts provide you with potential tax relief. Cash gifts are the most common type of charitable gifts the Foundation receives, often in response to annual appeals to **The Care Fund**.

Stocks should be transferred directly to The Marquette Manor Foundation’s account. (Please contact the Executive Director for helpful instructions.) If the stock has been held at least a year and a day, and has appreciated in value, you may receive a charitable deduction for the full fair market value as well as avoid capital gains tax. Should you want to donate securities that have lost value, sell them first, donate the cash, and claim the tax loss.

Matching Gifts

Check with your former employers – some large corporations match their retired employees’ outright charitable gifts with a contribution of equal amount or some portion of the gift. Donors may also use their own significant gift as a matching gift, challenging others to give to Marquette Manor Foundation as well.

Donor Advised Fund (DAF)

The Foundation is pleased to accept grants from Donor Advised Funds. Contact your Fund Sponsor to arrange a grant to ”Marquette Manor Foundation, Inc.” The Foundation Executive Director can provide you with the details your fund administrator will require.

You Can Also Commemorate Those You Love

Whether a tribute to celebrate or an act of love to remember, giving a gift to The Marquette Manor Foundation In Honor or In Memory of someone raises their name to the fore, a small yet touching dedication to share what they mean to you.

In Honor Gifts may be made to thank or recognize anyone for a special occasion – like birthdays, anniversaries, being your best friend for 50 years.

In Memory Gifts are given specifically in tribute to someone special to you who has passed on.

Remembrance Gifts – Benches, Pavers, and Bricks are more permanent tributes to those honored and memorialized. At certain gift levels, their names are engraved onto plaques on benches, pavers, or bricks placed throughout the Marquette grounds.

You Can Continue Your Legacy of Generosity Through Your Estate Planning

The Marquette Manor Foundation accepts many planned giving vehicles with varying benefits to best fit your individual financial and estate goals and charitable intentions. Types of planned gifts include:

- Wills and Charitable Bequests
- Return of Capital Designation
- Gifts from Individual Retirement Accounts (IRAs)
- Life Insurance Policies
- Personal Property (e.g., antiques, jewelry, automobiles)
- Real Estate (e.g., farms, residential or vacation homes, or rental properties)
- Charitable Lead Trust (also known as Reverse Charitable Remainder Trust)
- Charitable Remainder Trust

For detailed information about making a planned gift to The Marquette Manor Foundation a part of your estate plan, please refer to *The Legacy Society* brochure.

The Legacy Society brochure describes a variety of giving vehicles to help you consider your estate plans and to aid you as you seek your financial advisor’s counsel. The Foundation Executive Director will also be pleased to answer your questions.

