

## **Leaving a Legacy: The Benefits of Including Charitable Gifts in Your Estate Plans**

*Support Your Values. Strengthen Your Community. Shape the Future.*

When it comes to estate planning, most of us focus on providing for our loved ones. But your legacy can extend far beyond your family—it can also impact the causes and communities you care about most. Including a charitable gift in your estate plan is a meaningful way to ensure your values live on while supporting the mission of organizations that matter to you.

For those connected to BHI Senior Living communities, one such opportunity is through the **BHI Foundation**, which supports benevolent care, life-enriching programs, and employee education and development across BHI campuses.

### **Why Consider a Charitable Gift in Your Estate Plan?**

#### **1. Leave a Legacy That Reflects Your Values**

Your estate plan is a powerful tool to communicate what you stood for in life. By including a charitable bequest, you can:

- Continue supporting a mission that aligns with your beliefs
- Honor your personal experiences with a particular organization or community
- Inspire future generations to follow in your philanthropic footsteps

#### **2. Support Organizations You Trust**

Planned giving ensures that your favorite nonprofit—like the BHI Foundation—can continue its work for years to come. Your gift helps:

- Provide benevolent care to residents who outlive their financial resources
- Enrich the lives of seniors through wellness programs, campus improvements, and cultural initiatives
- Invest in the dedicated employees who care for our residents by supporting scholarships and professional development

#### **3. Create Potential Tax Advantages**

Charitable giving can also be a wise financial decision. Depending on your estate size and the structure of your gift, benefits may include:

- Reduced estate and gift taxes
- Opportunities to provide income to loved ones through charitable remainder trusts
- Maximizing the impact of your estate while still caring for heirs

#### **4. Make a Bigger Impact Than You Thought Possible**

Even modest gifts can make a significant difference when thoughtfully planned.

Including a percentage of your estate or a specific asset—such as stock, real estate, or retirement accounts—can have a lasting impact without affecting your current financial situation.

#### **Why Choose the BHI Foundation?**

The **BHI Foundation** is the philanthropic heart of BHI Senior Living, dedicated to enhancing the lives of residents, families, and staff across all BHI communities. With a commitment to compassion, excellence, and stewardship, the Foundation ensures that no resident is ever asked to leave due to financial hardship, and that programs and people continue to thrive.

By including the BHI Foundation in your estate plans, you are helping to preserve this mission—ensuring future residents receive the same quality care, community, and dignity that you value today.

#### **How to Get Started**

Making a charitable bequest is easier than you might think. You can:

- Include the BHI Foundation as a beneficiary in your will or trust
- Name the Foundation as a beneficiary on a retirement plan or life insurance policy
- Explore other planned giving tools with the help of your financial advisor or estate attorney

If you've already included the BHI Foundation in your plans, we invite you to let us know so we can thank you and welcome you into our **Legacy Society**—a community of forward-thinking donors who are making a lasting impact.

#### **Your Legacy Matters. Let It Live On Through Generosity.**

To learn more about planned giving opportunities or to have a confidential conversation about your goals, please contact the BHI Foundation.

Together, we can create a legacy of care, compassion, and community.