

### Charitable Giving: Leaving a Legacy

If you would like to include supporting St. Vincent Waukesha County in your plans contact, Kathryn Leverenz, Waukesha County Community Foundation President to make sure your wishes can be fulfilled.

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### Remembering Us In Your Will

If you would like to support our mission after your lifetime, share the following suggested wording with your estate planning advisor to add to your will or living trust.

I give to the St. Vincent Waukesha County Fund  
(the sum of \$\_\_\_\_\_ or \_\_\_\_\_ percent of the remainder of my estate)  
to support the ministries of the Society of St. Vincent de Paul of  
Waukesha County, Inc.

St. Vincent Waukesha County legal name:

Society of St. Vincent de Paul of Waukesha County, Inc.

Our Federal ID# is: 39-0909537

Be sure to consult your tax advisor or other estate-planning professional.



### St. Vincent Waukesha County Contact:

Julie McIntyre

Executive Director

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Email:

[jm@stvincentwaukcnty.org](mailto:jm@stvincentwaukcnty.org)

*Society of St. Vincent de Paul of Waukesha County Inc. is a Catholic lay volunteer organization in which members join together to grow spiritually by providing person-to-person services to people who are in need, suffering or forgotten. We provide tangible assistance that may include emergency rent, utilities, food, clothing household goods and/or referral services. Sales of the donated goods at the two St. Vincent de Paul thrift stores help fund the charitable work of the Society in Waukesha County. These and all other services provided by the Society are offered without regard for the religious affiliation of beliefs of those assisted.*

*The Society of St. Vincent de Paul is a nonprofit, tax-exempt charitable organization.*



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## St. Vincent Waukesha County



# Planned Giving and Legacy Gifts



St. Vincent de Paul staff and members often hear from friends, neighbors, former clients and store patrons about the important role the society played in their lives. Look almost anywhere in Waukesha County and you will likely see the presence of St. Vincent in one form or another.

Following are just a few of the places you will see St. Vincent Waukesha County at work:

- The Meal site at the Hope Center where St. Vincent hosts a hot meal to the hungry each Monday evening.
- The Summer Lunch Program at Haertel Field Park where children and their parents can get a nutritious lunch throughout the summer months.
- The many parish food pantries that serve people week after week.

- The County Jail, where visits to inmates are ongoing and aftercare services are offered upon release.
- The Thrift stores where donated items are provided to those in need.

What you may not see, is the assistance St. Vincent Waukesha County offers to your neighbor who recently lost a job or who is suffering from health issues or facing eviction or power loss; neighbors who are simply trying to make ends meet during hard times.

*Your will is one of the most important documents you will execute during your lifetime.*

*It is a reflection of your life values and your love and concern for family, friends and organizations that you believe in.*

Leaving a legacy or bequest to St. Vincent Waukesha County is one way to give back to the community and assure St. Vincent's longevity and continued success in achieving its mission.

### Planning is for Everyone

Estate planning presents unique opportunities and planning possibilities to everyone. The fundamental purpose of an estate plan is to arrange for the orderly and intentional disposition of your personal assets. Everyone benefits from this kind of planning.

If you do not have a will, laws of your state determine the distribution of your assets according to a fixed, statutory formula. If you intend to make the final decisions regarding

what and how you leave your assets to others, you must have a plan in place.

### Why Have a Will?

Your will is a unique legal document. During your life it lies “dormant.” You can change or cancel it and it has no effect on your financial, business or social situations. But at death, your will becomes extremely important. It will be submitted to a court. When the court accepts your will as valid, its terms will control the disposition of assets you have accumulated through a lifetime of effort. Certainly, your will can have a profound effect on the financial well being of family members, friends and institutions. In all events, it will be a permanent reflection of your personal life values and your love and concern for family, friends and community. That is why everyone should enlist the help of an attorney in preparing a will; it is one of the most important documents you will execute during your life.

### Peace of Mind

There is much to be said for the peace of mind that accompanies a well thought-out will. You are assured that your assets will be handled as you wish and on your terms. You can provide for special needs or considerations for your loved ones.

Your will provides you with an opportunity to make certain that critical decisions are made by you

– not the state, the court or a relative you may hardly know.

### You Are In Charge

A will also provides clear documentation of your intentions. Your will is a legally enforceable document used by the court to control the disposition of your assets. It is an ideal way to make certain your wishes are known and ultimately fulfilled.



### Ease the Burden for Loved Ones

Your will can also be viewed as a thought-out gift to your family and friends. Because your decisions are documented, you relieve loved ones of the complex and often difficult job of determining how you would have wanted estate assets to be distributed.

### Your Charitable Giving Lives On

Bequests, which are gifts made through a will, is a way of providing long-term support for the charitable organizations that are so important in our lives.

There are many reasons donors choose to make charitable bequests: the opportunity to make a statement about personal values, the satisfaction of supporting an important cause to benefit future generations and the chance to leave a legacy to inspire others to give.

### Where to Start

The first step is to meet with an advisor to get the planning process started. You will benefit from the help of a professional who can steer you toward good planning decisions that meet your personal goals and adhere to the legal requirements in your state.

Once your estate plan is in place it is very important to review the plan periodically. Changes may take place in your goals or finances. Family changes, unexpected needs of family members and other factors may provide another good reason to revisit your estate plan.

***A Lasting Gift***  
***A simple and easy way to leave a legacy gift to a favorite charity***

### Leaving a Legacy to St. Vincent Waukesha County

Once you have provided for loved ones in your will, you may include a gift of money, stock or property to St. Vincent de Paul, an organization you have believed in and supported in your lifetime. It is an easy way to make a difference without affecting your current cash flow. You can leave a specific dollar amount or a percentage of your estate. When planning a future gift, it is sometimes difficult to determine what size donation will make sense. Emergencies happen, and you need to make sure your family is financially taken care of first. Including a bequest of a percentage of your estate or a percentage of your residual estate ensures that your gift will remain proportionate to your estate size, no matter how it fluctuates over the years.

This important gift is a lasting tribute to your concern to help our neighbors in need and will help secure a strong future for St. Vincent Waukesha County.



### St. Vincent Waukesha County Creates Endowment Fund

In April 2012, St. Vincent Waukesha County established an endowment fund at the Waukesha County Community Foundation (WCCF).

WCCF is a pool of permanent endowment and project funds created primarily by and for the people of Waukesha County to provide grant support to charitable organizations that serves a broad spectrum of community needs.

As a public charity, WCCF enables individuals and qualified organizations to establish or contribute to permanent charitable funds.

These funds are combined for investment purposes to ensure efficiency and long-term growth. The funds provide annual earnings which are directed to charitable needs in the community by established donors' wishes and the Board of Directors.

St. Vincent Waukesha County entrusts the valuable experience of the WCCF. They offer professional management of funds to ensure greater safety, cost efficiency, diversity and earnings to preserve and build the services and programs of St. Vincent Waukesha County for generations to come.

We share the trust of the WCCF with the Waukesha Food Pantry, Interfaith Senior Program, La Casa de Esperanza, NAMI, Mental Health Association as well as many others.

To learn more about the Waukesha County Community Foundation visit their website: [www.waukeshafoundation.org](http://www.waukeshafoundation.org)



Kathryn Leverenz,  
Waukesha County  
Community Foundation

### In Appreciation

We gratefully acknowledge the following memorials and gifts to St. Vincent Waukesha County given by the following donors honoring loved ones. These gifts were received between January 1, 2012 and May 30, 2012.

<b><i>In Memory of:</i></b>	<b><i>Maria Garcia</i></b>	<b><i>Marie Friedel</i></b>	<b><i>Mary Hamilton</i></b>	<b><i>Thomas Rooney</i></b>
<b><i>Frances McIntyre</i></b>	Mr. & Mrs. Stevens	Ronald & Sandra Friedel	John McCarthy	Thomas & Kathleen Hyslop
Kurt & Susanne Schmidt	Kim & David Cleppe	Anna Freund	Debbie & Michael Sievert	Myron & Linda Feldman
Dennis & Bonnie	<b><i>Maynard Solwold</i></b>	Charles & Kathleen Friedel	Robin Barr	Lois & Gayle Best
Grossklaus	Eugene & Mary Solwold	Virginia & Charles Schwerm	Dolores Slane	Connie & Todd Lynch
Robert McIntyre	Isabel Brown	Pauly Construction	Mark & Julie Goltermann	<b><i>Ralph Eberle</i></b>
Julie McIntyre	Lake Mills Education Assn		Richard & Kay Meyerring	Keith & Kathie Dunton
	Jay Solwold		James & Maureen Haines	
			Christine & James Jensen	