



Mt. Morris Camp & Conference Center

Scenic Central Wisconsin's Full Service, Four Season
Camp, Retreat, & Conference Center

Reservations & Information: 888-mt-morris



Planned Giving to Mt. Morris Camp & Conference Center

Creating a Legacy

Legacy Gifts and Planned Giving

Planned giving is a way for you to contribute money to the Mt. Morris Camp & Conference Center while simultaneously realizing your estate and financial planning goals. A variety of arrangements are possible for you and/or your family to create a lasting legacy to Mt. Morris yet allowing for personal realizable goals to be met. These gifts vary widely in size, form and purpose, but each in its way insures the ministry of Mt. Morris will prosper and grow to better serve campers and guests. To let us know you have included Mt. Morris in your will/estate plans, please download the **Creating a Legacy Form**. Every person who has included Mt. Morris in their estate planning will become a member in the **Friends and Alumni of Mt. Morris (FAMM)**.



How Legacy Gifts Are Used at Mt. Morris

Annual support from friends of Mt. Morris allows the Center to grow its ministry of hospitality to campers and guests – church, civic, and educational organizations. A gift through your will or living trust goes an important step further - it provides Mt. Morris long-term financial security, thus ensuring that ministry will continue its work for years to come.

Planned Giving: Types of Planned Gifts

Bequests

Bequests are gifts made through a will or living trust. They are especially popular for people who want to make a gift of significant size but who cannot give up income or capital during their lifetime. The future gift is revocable, and you retain control of the assets to meet future needs. Bequests of all sizes benefit Mt. Morris.

You can make a gift in the following ways:

- ***A percentage of your total estate:*** In using this approach, your gift adjusts with changes in the size of your estate.
- ***The residue or a percentage of the residue of your estate:*** After your specific gifts to loved ones have been made, you may designate that the entire residue or a percentage of the remainder shall go to one or more charitable organizations. With this approach as well, your gift adjusts with changes in the size of your estate.
- ***A gift of a specific amount:*** You specify a dollar amount to be given to one or more charitable organizations. With this kind of gift, it is especially important to keep your will or trust up-to-date.
- ***Contingent bequest:*** You specify that Mt. Morris is to receive a gift only in the event of the death of other beneficiaries.

The following is sample bequest language you can share with your attorney:

I give, devise, and bequeath [insert amount of gift, percentage of estate, or residuary of estate here] to Moravian Mt. Morris Center, Inc. (commonly known as Mt. Morris Camp & Conference Center) located at W6016 Blackhawk Road; Wautoma, WI 54982.

Checking Accounts, Savings Accounts, CDs

By filling out a simple form at your financial institution you can designate Mt. Morris to receive the remaining funds in these accounts after you're gone.

Life Insurance

Many individuals have life insurance policies whose benefits they no longer need. If this applies to you, you may want to consider naming Mt. Morris the beneficiary and assigning us ownership of the policy. In doing so, you will receive a charitable deduction; and in removing the life insurance policy from your estate, you may also reduce your estate taxes.

Retirement Plans

Retirement plans are excellent assets to leave to Mt. Morris. IRAs and qualified retirement plans such as 401(k)s, when passed on to heirs, can incur as much as 70 percent in taxes, because this asset faces double taxation. Not only is the plan benefit reduced by estate taxes, but the recipient must also pay income taxes on the plan. (Estate taxes at gradually reduced rates continue until at least 2010 under the 2001 tax revisions.) If you plan to make a Legacy Gift to Mt. Morris, you may want to consider naming us the beneficiary of your 401(k), pension, or other retirement plan, and leaving other assets to your family. Naming us the primary beneficiary avoids all income and estate taxes on the retirement plan. Of course, you can also name Mt. Morris for a portion of the assets, or as a contingent beneficiary, with the gift to be effective only after the death of a spouse or other family member.

Moreover, in 2001 the IRS issued favorable, simplified new rules for calculating minimum annual payments from IRAs and other retirement accounts such as 401(k)s. These new rules make it easier for you to accumulate more savings – tax deferred – in your account. Now you can name Mt. Morris as a beneficiary without increasing the minimum amounts you must withdraw each year. By taking advantage of these new rules, you can keep more tax-deferred savings in your account during your life, and designate an important future gift to Mt. Morris.

To designate Mt. Morris, simply contact your plan manager, ask for a change of beneficiary form, and name Moravian Mt. Morris Center, Inc. (commonly known as Mt. Morris Camp & Conference Center)

Stock

Mt. Morris Camp & Conference Center accepts gifts of stock for current year contributions. Instead of giving cash as your contribution, give stock instead. An outright gift of these investments totally eliminates any capital gains taxes and gives you a tax deduction of the total current market value of the asset on the date we receive the stock transfer. It is important that you *transfer* the ownership of these assets to Mt. Morris instead of selling them and giving the proceeds of the sale. If you sell the asset and then gift the proceeds, you will be responsible for capital gains taxes. **Transferring ownership eliminates the capital gains tax liability.**

The Moravian Ministries Foundation (MMF)

The Moravian Ministries Foundation is a resource available to all Moravians interested in services and programs that benefit the work of the Moravian Church. The staff of the MMF is trained, high competent professionals knowledgeable in all areas of estate planning. You are encouraged to contact the MMF to discuss your estate planning goals and to determine the best methods to name Mt. Morris as a beneficiary of your estate. MMF contact information:

888-722-7923 * Email: paul@mmfa.info

Web: www.mmfa.info

The Value of Your Legacy to Mt. Morris

Since 1964 the Moravian Church Western District has been served by the hospitality services offered at Mt. Morris. The Center has grown to a year round full service camp and conference center serving thousands of campers and guests each year. People come to Mt. Morris for a variety of reasons but a constant ingredient of their experience is the care received by caring staff committed to providing exceptional guest service! Gifts to Mt. Morris come in a variety of sizes and types. Large and small, these gifts are vital to the success of Mt. Morris' efforts to transform lives – one person at a time... for generations to come.



Legacy gifts can be applied several ways to enhance and grow the Mt. Morris ministry:

- *Undesignated Friends of Mt. Morris Fund – this is our general fund and gifts allow us to sustain the ministry's operational expenditures*
- *Thorstad Property Loan Pay-off – In 2005 Mt. Morris purchased approximately 10 acres on the far north side of the property allowing full access around Little Lake and a buffer between the Center and further development. Many ideas have been shared to "how to use" this property. Those final plans are still being considered*
- *Scholarship giving – Mt. Morris, while attempting to establish fair and reasonable rates, sometimes is still unavailable to guests because they don't have the financial resources for a camp, retreat, or conference. A gift of scholarship allows us those who may not be able to come to Mt. Morris to attend because of your scholarship gift.*

While most gifts come in the form of cash via check or credit card, many have found that time spent considering WHAT to give as well as WHEN and HOW to structure their contributions can help them make more meaningful gifts while meeting personal planning goals as well.

Exploring Mt. Morris' gift planning options, you will:

- *Discover ways to make larger gifts than you may have thought possible.*
- *Learn how to make gifts that actually "give back" for a time, providing extra income in retirement years or helping to fund elder care, educational expenses and other needs of loved ones.*
- *Add special meaning to your gift by making a gift that honors a special friend or loved one.*
- *See how to save money on income, gift, and estate taxes and instead put those amounts to use in ways you choose.*
- *Enjoy giving - knowing that you've invested in a ministry committed to transforming lives through hospitality and quality services.*

That's what effective gift planning is all about. It just makes sense to make the most of what you have by preserving financial security for yourself and your loved ones as you make a positive impact through the ministry of the Mt. Morris Camp & Conference Center.

Legacy Form

Mt. Morris Camp & Conference Center



Contact Information

Name(s) _____
Address _____
City _____
State _____
Zip _____
Phone (____) _____
Email _____
Birth date _____
Spouse Birth date _____
Signature _____

YES! I/We confirm that I/we have made a planned gift to Mt. Morris Camp & Conference Center. By making this gift, we are encouraging others to follow our leadership. Please check one of the following:

- I/we give my/our permission to Mt. Morris to publicly recognize my/our Legacy Gift to Mt. Morris Camp & Conference Center in printed materials. *(Please use my/our name as it is listed above).*
- I/we prefer to remain anonymous. Please do not list my/our name in Mt. Morris publications.
- My/our planned gift is in the form of a:
- | | |
|-------------------|----------------------|
| ____ Will Bequest | ____ Retirement Plan |
| ____ Trust | ____ Other |
| ____ Annuity | |

Optional

Estimated value of gift: \$ _____ As of _____
Monetary Value *Date*

Benefits of Creating a Legacy to Mt. Morris:

- *Recognition of your gift (Unless anonymity is preferred)*
- *Membership: Friends and Alumni of Mt. Morris (FAMM)*
- *Personalized copy of "Homecoming for a Wandering Camp Ministry" – Rt. Rev. Paul Graf*
- *Satisfaction of knowing you have made a significant contribution to the future of the Mt. Morris Camp & Conference Center*

**Please return form to: Executive Director; Mt. Morris Camp & Conference Center
PO Box 676; Wautoma, WI 54982-0676
Or, Call 888 – 686-6774 and ask for Joel Jarvis, Executive Director**