



**Mennonite Home Communities of Ohio
MHCO Legacy Society**

MHCO Legacy Gift affirmation

Bequests, retirement plan designations, trusts and other forms of planned gifts help sustain MHCO’s mission, core values and programs for future generations of elders. If you have named MHCO as a beneficiary in a will, retirement plan, trust, or other planned gift, we hope that you will share this good news with us.

This confidential legacy gift record will help us ensure that your wishes are fulfilled, and will also allow us to honor you as a member of the **MHCO Legacy Society**, which recognizes people like yourself and other friends who have provided for MHCO through their will or as the ultimate beneficiary of a planned gift.

This document is an affirmation of your intention and does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit MHCO in the future and give us counsel as to how it might serve MHCO. We recognize that annual giving and estate plans may change over time depending on one’s circumstances. MHCO resident’s and their loved ones along with community members thank you for your expression of support for the programs and quality of care that will be provided through your generous gift.

Name(s): _____ Birthdate(s): _____

Address: _____

Phone: _____ Relation to MHCO: _____

Estate Gift Information – My/our gift is part of a:

- Will IRA or Other Retirement Account Revocable “Living” Trust Charitable Remainder Trust
- Life Insurance Policy Irrevocable gift: Specify _____ Other _____

An estimate of the current value of your planned gift would help MHCO plan for the future. Your estimate would be strictly confidential: \$ _____

MHCO should designate this gift for:

- Unrestricted, to provide maximum flexibility for MHCO.
- Restricted for the endowment: General _____ Other _____

Recognition

I/we prefer to be recognized in MHCO Annual reports and list of **Legacy Society** members the following way:

- Please list my/our name in all Legacy Society directories in the following manner:

- Please do not include my/our name in the **Legacy Society** directories.

Signature(s)

Signature

Date

Return completed forms or direct any questions to:

Mennonite Home Communities of Ohio, Chris Moser

410 W Elm St. Bluffton, OH 45817

Phone 419-358-1015 ext. 263

Email cmoser@mhcoliving.org