



Your Estate Planning Record



Provided as a courtesy of:



**Community Foundation of
Switzerland County, Inc.**

303 Ferry Street
P. O. Box 46
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Community Foundation of Switzerland County, Inc.

Mission

Connecting People Who Care With
Causes That Matter For Good For Ever
For Switzerland County

Belief Statement

We will serve our donors by:

- *Providing responsible stewardship
- *Promoting leadership
- *Making grants

Community Foundation of Switzerland County, Inc.

About our Community Foundation

Helping donors do
good work...forever



Russell & Vera McSwain created a fund in memory of their son, Kevin, to assist the Switzerland County Pacer Band.

The Community Foundation of Switzerland County, Inc. is a nonprofit, community organization created by and for the people of Switzerland County. We are here to help our donors make a positive impact on their community.

Three special features of community foundations:

One: personalized service. We make giving easy and effective, accepting a wide variety of gifts and providing donors with a number of charitable options. You can contribute cash, stock, property, and bequests. You may establish a fund in your name or in the name of a loved one. In most cases, your gift qualifies for maximum tax advantage under federal law.

Two: local expertise. Our professional staff has an in-depth understanding of the issues, opportunities, and resources that shape our community. They monitor all areas of community need — including human services, education, the environment, healthcare, the arts, and economic development. We can help you learn more about local organizations and programs that make a difference in areas you care about most.

Three: community leadership. We invest in the long term and bring people and organizations together, convening diverse voices to address local issues and opportunities. Our business is building community.

Community Foundation of Switzerland County, Inc.

**A personal
legacy of
giving**

**Helping donors do
good work...forever**



Laretta Borgman has created six scholarship endowments in the Community Foundation of Switzerland County to honor the memory of her family members.

What is an endowment? When you create a charitable fund through your community foundation, you have the opportunity to benefit the community forever with a permanent endowment. Your gift is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift, and all future earnings from your gift, is a permanent source of community capital, helping do good work today and in the future.

Legacy and stability. Donors who endow their gifts can make a difference in their community during their lifetime and, at the same time, provide a gift that lasts forever. Grants will continue to be made in the name of the fund you establish so that your charitable wishes are preserved, even if an organization receiving grants ceases to exist in the future.

Leaders of a nonprofit organization may also look to the community foundation to hold their organization's endowment because they know that having a constant source of funding helps them respond to emergency needs as well as plan for the future and sustain the good work they do.

Expert help. When donors or nonprofit organizations work through the community foundation to achieve their charitable goals, they benefit from the expertise of experienced staff, community leadership, and investment management.

The Power of Endowment

A half century ago, Paul Cesarz made a choice that continues to benefit his community today. He created an endowed fund in 1952 with \$150,000 in assets. The fund immediately began earning income and distributing grants to causes important to him. Fifty years later and 35 years after Paul's death, the Cesarz Fund had grown to \$1,066,003. And in that 50th year, it generated more than \$50,000 in grants, supporting a range of community needs — a park renovation, a museum exhibit, cancer research, and more. Because Paul chose to endow his gift, he has enabled more than \$1.1 million in grants to go to his community — almost eight times the impact he would have made by giving the original gift to charity all at once. And though Paul has passed away, the fund in his name will go on supporting his community, leaving a lasting legacy



Community Foundation of Switzerland County, Inc.

Introduction

Most of us would rather not discuss our inevitable passing. We know that it will happen, but not today. So we put it off until, unfortunately, it is too late and decisions about what to do about the funeral and your estate is left to others. It could be loving family members, who without advance planning, are left to make major decisions about your legacy at a time of grief, or it could be left for the State government to make those decisions for you.

This booklet is designed to serve as a quick guide to help you collect and focus your thoughts, and assemble the information necessary to ensure that your wishes are carried out as you desire. It will also focus on what you are asking your heirs to do and then to share your desires with your children and loved ones.

We ask that you take the information that you gather, share and discuss your wishes with your heirs then discuss with qualified professionals as to how to legally write your will and establish any financial mechanisms necessary to implement your desires.

If you have any questions about this booklet or any of the activities of the Community Foundation of Switzerland County, please do not hesitate to contact us.

Sincerely,



Pamela W. Acton
Executive Director

Please note that nothing in this booklet is intended to give legal, investment or tax advice. The reader should contact qualified professionals in those fields for appropriate advice.

Personal and Family Information

First _____ Middle _____

Last _____ Maiden Name _____

Street Address _____

City _____ State _____ Zip _____ Years at Address _____

Previous Address _____

_____ Years at Address _____

Date of Birth _____ Country of Citizenship _____

City, State & County of Birth _____

Society Security Number _____

Marital Status [] Single [] Married [] Divorced [] Widowed

Date & Place of Marriage _____

Name of Spouse/Partner _____

Address _____

Date of Birth _____ Date of Death _____

Education:

School(s) _____

Degree(s) _____

Occupation _____

Employer _____ # of Years _____

Military Service:

Branch _____ Rank _____ Serial Number _____

Date & Place of Induction _____

Date & Place of Discharge _____

Father's Name _____ Birth Place _____

Mother's Maiden Name _____ Birth Place _____

Endowment Funds

Scholarships

Jane Alexander Memorial Scholarship
Johnny Andrew 4-H Scholarship
Baatz, Borgman and Hastings Scholarship
Shawn M. Barnes Memorial Scholarship
Linda Lee Bennitt Memorial Scholarship
Lauretta & Clyde Borgman and Ralph Baatz Scholarship
John & Freda Bott Memorial Scholarship
The Buchanan Family Memorial Scholarship
Nelson W. Burley Memorial Scholarship
Bernice Hart Demaree Memorial Scholarship
The Fisher Family Scholarship
Newell Fox/Mickey Lamson Scholarship
Pete Furnish Scholarship
Robert Furnish Family Scholarship
Robert E. & Betty J. Hardin-Hanover College Scholarship
Guy S. Harris Scholarship/Patriot Alumni Scholarship
Haskell & Morrison Funeral Home Scholarship
Amos & Anna (Gates) Hastings Scholarship
Dale & Edith (Peters) Hastings Scholarship
Marylou Hocker Memorial Scholarship
Pete Hollitt Memorial Scholarship
Sandra W. Kidwell Memorial Scholarship for Special Education
O.H. & Helen McNary Memorial Scholarship
North Bend Farms & Cinergy Scholarship
Roger & Bev Parrott Scholarship
Jeanette Orem Parvis Scholarship
Lawrence & Garnet Pickett Memorial Scholarship
U.P. Schenck Memorial Scholarship
Sterling Stringfield Memorial Scholarship
Jack Sullivan Pharmacy Scholarship
Switzerland County Chamber of Commerce Scholarship
Switzerland County Community Scholarship— Everett O'Day
Scholarship Fund
Switzerland County Elementary PTA Scholarship
Chad Valentine Memorial Scholarship
Diego & Fidelia Valenzuela Scholarship
Vevay-Switzerland County Lions Club Scholarship
Scott Welch Memorial Scholarship
Leland & Aldean Wiley Family Scholarship
Alvin & Julia (Wiley) Works Scholarship
Roy D. Works, Matt & Ethel M. Scudder Memorial Scholarship

Community Foundation of Switzerland County, Inc.

Endowment Funds

Community Funds

Your gift can address ever-changing community needs.

Community Foundation Board & Alumni Community Fund
William & Kathy Day Community Fund
Switzerland County Community Fund
Vevay Deposit Bank Community Fund
Vevay-Switzerland County Foundation Community Fund

Donor Advised Funds

The grants from these funds go to charities as recommended by the donors.

Jim Alexander Memorial Fund for Agriculture
Lynn Bear Memorial Fund
Gullion Family Fund
Michael J. Leap Memorial Fund
George A. Robbins Memorial Fund
Lowell Wayne Sullivan, True to the Red, White & Blue Fund

Nonpermanent Funds

These funds will be totally granted out.

Sgt. Kenneth Raymond Booker Memorial Fund
Angela Hunger Hoskins Memorial Fund
Roger May Memorial Fund
Dalton Scudder Memorial Scholarship
Loni Amber Lynn Turner Memorial Scholarship
Carrie Lynn Van Norstran Fund
Buck White Memorial Scholarship
Women's Fund of Switzerland County

Acorn Funds

This fund is under \$5,000, but the donor is set on a schedule to add to the fund so that it reaches the \$5,000 minimum in a reasonable time.

4-H Endowment Fund
Pam & Bud Acton Fund
Oscar, Bea, Sherry, Edd Cook Family Scholarship Fund
William Dowdy, Jr. & Barbara Althoff Dowdy Fund
Randy Hise Memorial Fund for Scalo House
Historic Hoosier Hills RC&D- Switzerland County Fund
Vera Sue Keith Memorial Fund
The Pacer Scholarship Fund
Switzerland County FFA Fund
Glenda H. White Scholarship in memory of Sandra W. Kidwell

Family Record

Spouse/Loved One _____

Parents _____

Children

Siblings

Grandchildren

Great Grandchildren

Additional Family Members

Important Documents

Please specify the location of each item.

Birth Certificate _____

Children's Birth Certificate(s) _____

Marriage License _____

Military Records _____

Last Will and/or Trust _____

Funeral Documents _____

Life Insurance Policies _____

Health & Accident Policies _____

Property Insurance Policies _____

Real Estate Deeds _____

Mortgages/Notes _____

Bank Records _____

Stocks/Bonds/CDs _____

Pension/Retirement Plans _____

Income Tax Records _____

Auto Registration/Titles _____

Safe Deposit Box _____

location box number key

Other Documents _____

Endowments

Many Switzerland County residents have created endowment funds within the Community Foundation. If you do not wish to create a new fund, you may bequest part of your estate to an existing fund that supports something near and dear to you.

Designated Funds

The donor identifies one agency to receive all grants from this fund. Agency endowments fall into this category.

Jack & Margery Aldred Memorial Fund for Mt. Sterling Baptist Church

Delores Cole Memorial Fund to support the Switzerland County EMS

Community Foundation Administrative Fund

Edwin C. Danner, American Legion Post 185 Scholarship Fund

Developmental Services, Inc. Fund

East Enterprise Volunteer Fire Department Fund

Nick Hart Memorial Scholarship Fund

Kiwanis Club of Vevay, Inc. Fund

Randy Knott Fund for Switzerland County Animal Shelter

Lifetime Resources Senior Services Development Fund

Kevin McSwain Memorial Fund to support the Pacer Band

Debbie Minch Memorial Fund for Switzerland Co. FFA Leadership

Conference

The Pacer Band Fund

Switzerland County Animal Shelter Fund in memory of John A. &

Hazel M. Dangle

Switzerland County Historical Society, Inc. Fund

Switzerland County Quality of Life Fund

Switzerland County School Corporation Fund

Switzerland County YMCA Fund

Technology for High School Enrichment Fund

Town of Vevay Quality of Life Fund

Vevay-Switzerland County Foundation Fund in memory of Ralph W.

Tilley for the Switzerland Co. YMCA

Vevay Switzerland County Tri Kappa Fund

Field of Interest Funds

This fund enables the donor to stipulate a general area of interest to receive its money instead of a specific organization.

Hannah Grace Klein Memorial Fund

Switzerland County's Animals & Environment Fund

Switzerland County's Health & Safety Fund

Switzerland County's Lifelong Learning Fund

Switzerland County's Recreation Fund

Switzerland County's Youth & Families Fund

Charitable Interests

You may want to consider remembering a number of religious or charitable interests as part of your estate. You can designate a set amount, a percentage, or the residual of your estate, and in some cases receive a substantial reduction in federal gift and estate taxes. Talk with your attorney and tax advisor.

You can bequest a gift to just about any charitable activity, organization and even your church. Making that bequest to the organization of your choice through an endowment fund in the Community Foundation is For Good For Ever. Endowments allow you to continue supporting those charitable causes even after you are gone. Endowments are permanent. Your gift is invested over time. Earnings from your fund are used to make grants. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping do good work today and in the future.

Making a bequest to your community foundation is an easy way to transfer assets to charity. And, you can decide to do it at any age by adding to an existing will or drafting a new one. In doing so you leave a legacy to your community.

The Community Foundation of Switzerland County provides a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

To help you discuss this with your attorney, the following is language that may be used to leave a bequest to the Community Foundation.

“I do hereby give and bequeath the sum of \$ _____(OR)_____ percent of my estate (OR) all of the residue of my estate to the Community Foundation of Switzerland County, Inc., an Indiana nonprofit organization, to be used in all furtherance of the charitable purposes of the Community Foundation as defined in and subject to the provisions of its Articles of Incorporation and Bylaws.”

***If you are interested in establishing a named endowment or adding to one that already exists, please ask your attorney to contact us for the exact language that should be used.**

Important Information Insurance

Life

Insurance Company	Agent	Phone
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Policy Number	Benefit Amount	Beneficiary
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Insurance Company	Agent	Phone
-------------------	-------	-------

Policy Number	Benefit Amount	Beneficiary
---------------	----------------	-------------

Health & Accident

Insurance Company	Agent	Phone
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Policy Number		
---------------	--	--

Insurance Company	Agent	Phone
-------------------	-------	-------

Policy Number		
---------------	--	--

Property (homeowners, auto, other)

Insurance Company	Agent	Phone
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Policy Number	Type of Insurance	Property Insured
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Insurance Company	Agent	Phone
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Policy Number	Type of Insurance	Property Insurance
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Important Information Banking, Investments & Credit Accounts

Banking

Institution	Phone
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Account Type	Account Number
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Institution	Phone
-------------	-------

Account Type	Account Number
--------------	----------------

Institution	Phone
-------------	-------

Account Type	Account Number
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Investments

Investment Type	Company	Acct./Certif. Number
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Investment Type	Company	Acct./Certif. Number
-----------------	---------	----------------------

Investment Type	Company	Acct./Certif. Number
-----------------	---------	----------------------

Investment Type	Company	Acct./Certif. Number
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Credit Accounts

Creditor	Address	Phone	Acct. Number
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Creditor	Address	Phone	Acct. Number
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Creditor	Address	Phone	Acct. Number
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Distribution of Your Estate

Be proactive. If you do not already have a will or trust, locate an estate-planning attorney and set up a meeting. If you die without a will or other such document, the state will decide how to disburse your estate. You do not have to be “rich” to worry about these things.

Before your meeting with your attorney about your estate plan, you can do some things to save time and money.

- Prepare an inventory of your estate. (anything you own is your estate)
- Select key people you want to involve.
- Decide what to give family members
- Determine your charitable bequests.

You do not need to distribute every item of your personal or real property in your will. Only if there is some specific item or piece of land that you want to go to a certain individual do you list it. And if you wish to name a specific sum of money to a person or organization, state the amount and the name.

After the specific bequests, if any, the easiest way to divide the remainder of your estate is by percentages. Name the persons or organizations you wish to remember, and then state what percentage of the total remaining amount of your estate each is to receive.

Name your Executor

An executor is one who is appointed by you to carry out the terms of your will. If you do not name an executor in your will, the court will appoint an administrator. He or she may not be the one you would have appointed, so exercise the right to name the person of your choice.

Care for Your Children

If you have minor children, you should name a Guardian for them in your will. This person will have care of the children and the property you have willed to them. You can narrow this service by having a Guardian to care only for the children and a separate Executor or Trustee for their estate. He or she will hold the property and expend it as your will directs.

Final Wishes

I have pre-planned my funeral arrangements with:

Name _____

Address _____

Phone _____

Manner of burial or cremation instructions

Cemetery _____

Type of service I prefer _____

Person to Officiate _____

I direct that my body be used for these medical purposes _____

I have directed that the following organs may be used in an organ donation program _____

Pallbearers

Important Information Banking, Investments & Credit Accounts

IRA's, Pension Plans

Institution	Address	Phone	Acct. Number
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Institution	Address	Phone	Acct. Number
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Institution	Address	Phone	Acct. Number
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Institution	Address	Phone	Acct. Number
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Deferred Compensation

Institution	Address	Phone	Acct. Number
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Institution	Address	Phone	Acct. Number
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Institution	Address	Phone	Acct. Number
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Annuities

Institution	Address	Phone	Acct. Number
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Institution	Address	Phone	Acct. Number
-------------	---------	-------	--------------

Institution	Address	Phone	Acct. Number
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Personal Property

List items for special consideration individually or grouped.

Household furnishings and furniture, art works, books, musical instruments, automobiles, jewelry, etc.

Contacts

First Person to be Notified Upon My Death

Name _____

Relationship _____

Address _____

Phone _____

Funeral Home to Contact

Name _____

Address _____

Phone _____

Personal Advisers

Accountant Address Phone

Attorney Address Phone

Clergy Address Phone

Investment Advisor Address Phone

Physician Address Phone

Insurance Agent Address Phone

Special People

Please be sure to notify these people of my passing:

Name _____

Relationship _____

Address _____

Phone _____

Name _____

Relationship _____

Address _____

Phone _____

Name _____

Relationship _____

Address _____

Phone _____

Name _____

Relationship _____

Address _____

Phone _____