

Masonicare at Ashlar Village

Helping Hands



A Publication of The Masonic Charity Foundation of Connecticut

WINTER 2011

Annual Appeal Gifts Benefit Your Neighbors, Too



Mike Johnson and his curious friend, Kelly

J. Michael (Mike) Johnson was a new arrival to Masonicare at Ashlar Village when he made his first gift to the Masonicare Annual Appeal, The Masonic Charity Foundation of Connecticut's ongoing campaign to benefit Masonicare residents and patients in need.

"I realized that there were people here who needed help," Mike says. "Masonicare residents are like my neighbors, so why not help them? It's a good thing to do."

Mike increased his Annual Appeal gift in 2010, doubling his previous year's contribution to join the Masonicare Society. He intends to continue increasing his support of the Annual Appeal. In

past years, gifts from generous donors like Mike have subsidized resident transportation, spiritual services, and in-home tele-monitoring systems, or have been used to purchase items such as replacement batteries for wheelchairs and scooters, hearing

aids, and dentures.

In a further show of support for the good work of Masonicare, Mike also included The Foundation in his recently prepared estate plan.

A retired commercial photographer, Mike was born and raised in Chicago, Illinois. His father had been the founder and owner of the Johnson Candy Company which was later bought out by the Peter Paul Company (now part of Hershey Co.). At the time of the buyout, when Mike was 18 years old, Mike's father was able to retire and he moved the family from Chicago to Cheshire, Connecticut.

Mike eventually built his own home in Cheshire, living there until 2008.

"I was looking for a comprehensive continuing care facility," he recalls, "and one day I came across an article in a highly regarded magazine that listed the top ones in the country. Masonicare was one of them. So I thought, 'Gee, I might as well go visit since it's so close.'"

Since moving in to his Notch Hill apartment two and a half years ago, Mike has been delighted with his choice (Kelly, Mike's inquisitive cat, also seems pleased with the accommodations).

"I like it very much," he says. "In fact, the longer I'm here, the more I like it. I had about an acre of land in Cheshire. After I moved to Ashlar Village, I saw landscaping staff raking up all the leaves and I said to myself, 'That's one thing I'm glad I don't have to do anymore.' The food is good here, too. I like all of the conveniences, like not having to climb stairs. And I can't believe how nice everybody is, whether they live here or work here." ■

See Page 4 for results
of the 2010 Ashlar
Village Appeal!

The Late Ann Curtis Remembers The Foundation



Ann Curtis (1913 - 2009)

In January, The Masonic Charity Foundation of Connecticut received its distribution of \$275,000 from the **Ann Curtis** Revocable Trust. A late Masonicare at Ashlar Village cottage resident who also lived at Pond Ridge, Ann had been a long-time friend of Masonicare, contributing in excess of \$600,000 to The Foundation between 2000 and 2007.

“Ann Curtis was a gentle, kind, and very elegant woman who cared deeply about helping populations in need: the elderly, children, and animals,” said Jennifer A. King, Executive Director of The Foundation. “Her dedication year after year to The Masonic Charity Foundation was just amazing. She supported every fundraising program we offered, and gave more fre-

quently and generously as time went on. Behind every gift she made to The Foundation was her desire to help Masonicare residents with limited financial means.”

“Ann would give the clothes off of her back to help a person in need,” added JP Venoit, Senior Vice President of Residential Services. “What I really admired about her was that, even if she had problems of her own, she was always more concerned about the welfare of others.”

A native of San Francisco, Ann received her nurse’s training and earned a degree in public health from the University of California at Berkeley. During World War II, she volunteered her services to the Armed Forces. While serving in Alabama, she met her future husband, the late Bro. Erle Curtis, a member of Widow’s Son Lodge No. 66. After the war, they settled in Connecticut, eventually becoming steadfast supporters of The Foundation.

Erle passed away in 1995, and Ann moved to Ashlar Village the following year. She thoroughly enjoyed her 13 years here, once calling Ashlar Village “the next best place to heaven.”

According to Jennifer King, the bequest received from the Ann Curtis Revocable Trust is earmarked for The Foundation’s Endowment Fund. A second, significant bequest was payable to her beloved longtime parish, First Congregational Church in Branford, CT. ■



LEAVE A LEGACY®
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Bequests to The Masonic Charity Foundation of Connecticut

The Masonic Charity Foundation of Connecticut deeply appreciates all bequests. Should you wish to remember The Foundation in your Will, we encourage you to provide the following bequest language to your attorney:

“I give, devise, and bequeath all the rest, residue, and remainder of my estate, or _____% (percentage) of my estate, or \$_____ (sum of money) to The Masonic Charity Foundation of Connecticut, Inc., located in Wallingford, CT.”

Bequests provide important revenue in support of the mission of Masonicare, enabling us to provide the highest quality healthcare programs and services to our residents and patients regardless of their ability to pay. If you wish to discuss a bequest to The Foundation, please contact Jennifer King, Executive Director, at 203-679-5555.

For Ashlar Village Residents ...

The Charitable Gift Annuity is Another Great Way to Give



In today's unpredictable economic climate, wouldn't it be nice to count on the security of fixed income payments regardless of how the market behaves? What if you could receive a charitable deduction and contribute to the well-being of others at the same time? If you have ever considered making a donation to The Masonic Charity Foundation of Connecticut, a charitable gift annuity might be right for you.

A charitable gift annuity (CGA) is a simple contract between the donor and The Foundation. In exchange for an irrevocable gift of cash or securities, a gift annuity provides the annuitant with fixed income for life at a highly competitive rate and ultimately benefits the good work of Masonicare. Annuities can be single-life or two-life contracts, and income rates depend upon the age(s) of the annuitant(s) at the time the gift is made. (For current CGA rates, please see the chart at right).

There are a number of benefits to funding a charitable gift annuity. We've already told you about the fixed, regular payments the donor(s)/annuitant(s) will receive. Compared to the rates of other investment options such as certifi-

cates of deposit, many people are very pleased with the attractive fixed annuity rates offered by The Foundation. Additionally, there are various tax incentives associated with a CGA. Not only can the donor/annuitant claim a charitable deduction with their gift annuity, but a portion of the fixed

income payments will be tax-free as well. If a CGA is funded with appreciated securities, capital gains taxes may be reduced.

All of this helps explain why the gift annuity has long been a favorite giving vehicle among The Foundation's donors, many of whom are Masonicare at Ashlar Village residents. Here are some interesting facts about The Foundation's CGA program:

- There are currently 73 active CGA contracts from 34 different Ashlar Village residents. This tells us that numerous Ashlar Village residents have been so pleased with the benefits of the annuity program that they have opted to invest in multiple CGAs with The Foundation.
- The average age of these Ashlar Village donors is 88. As you may know, the older the annuitant, the higher the annuity rate. In considering the timing of a new gift annuity, keep in mind that when one is within six months of his or her next birthday, the slightly higher rate will be available.
- The total value of gifts made by Ashlar Village residents to establish

annuity contracts with The Foundation is \$1,441,551.95.

Ashlar Village residents who have taken advantage of the CGA program have discovered another important benefit: the impact their gifts have on our residents and patients. Their generosity helps Masonicare provide necessary resources and programs to those it serves.

For more information about gift annuities, or to receive a personalized sample annuity illustration, please contact Alison Koons, Planned Giving Associate at The Foundation at 800-562-3952 or x5573. ■

American Council on Gift Annuities: Rates Effective July 1, 2010

SINGLE LIFE

<i>Ages</i>	<i>Rates</i>
65	5.5%
70	5.8%
75	6.4%
80	7.2%
85	8.1%
90+	9.5%

TWO LIVES (JOINT AND SURVIVOR)

<i>Ages</i>	<i>Rates</i>
65-65	5.1%
65-70	5.2%
70-70	5.4%
70-75	5.5%
80-80	6.3%
80-85	6.6%
85-85	7.1%
90-90	8.3%

Ashlar Village Appeal Results

Chaired by Notch Hill resident **Jim Ferris**, The 2010 Ashlar Village Appeal was launched by The Masonic Charity Foundation of Connecticut in September of 2010. A heartfelt thank you is extended to all who supported the 2010 Appeal!

The goal of this campaign was to sustain or exceed the previous year's level of participation from Ashlar Village residents. We are proud to announce that we achieved that goal, even in this difficult economic climate. The final result for 2010 was 63% resident participation totaling **\$54,566.23!**

Also, many thanks to the Ashlar Village Association (AVA) for its increased gift of \$5,000 to The Foundation in 2010. The AVA has been giving to The Foundation since 1988, and we are proud to have it as a partner in philanthropy.

The Masonic Charity Foundation deeply appreciates the generosity of Ashlar Village residents. Gifts to The Foundation provide for the greatest needs of the residents and patients of Masonicare when no other funding source is available.

Shopping for a Good Cause ... The Ashlar Village Op Shop



Resident **Jean Kaas** (above) has donated countless hours of her time over the years to operate The Op Shop at Ashlar Village. The store, located on the lower level of Bridgehouse, sells donated household items to other residents, staff and their families. Proceeds stay within the organization, with 80 percent going to The Masonic Charity Foundation of Connecticut and the remainder to the Ashlar Village Association. In 2010, The Foundation was honored to receive a total of **\$7,171.00** from the Op Shop. Many thanks, Jean!

The Masonic Charity Foundation of Connecticut

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