MOUNT CARMEL
Foundation
A Member of Trinity Health

MOUNT CARMEL FOUNDATION

PLANNED GIVING OPPORTUNITIES

Extend Your Impact—Leave a Legacy

Have you ever wanted to support Mount Carmel's life-changing Mission in a substantial way but felt you couldn't afford it?

There is good news! You can support our work without affecting your current lifestyle or your family's security. Planned giving allows you to make a meaningful gift today while preserving your assets for your future and loved ones.

GIFTS FROM A WILL OR TRUST

Designating Mount Carmel Foundation as a beneficiary in your will or trust is a simple way to show your support and commitment to the mission. This option does not affect your cash flow during your lifetime and can be changed if your situation or goals evolve.

BENEFICIARY DESIGNATIONS

Simply name Mount Carmel Foundation as the beneficiary of a retirement plan, financial account or annuity. You retain full use of these assets during your lifetime, and the designation can be updated at any time.

LIFE INSURANCE

Donate a fully paid life insurance policy and receive an opportunity for tax savings, or name Mount Carmel Foundation as a beneficiary of your policy.

APPRECIATED SECURITIES OR REAL ESTATE

Consider gifting securities or real estate to potentially avoid capital gains tax.

LIFE ESTATE

Transfer ownership of your home (including farm or vacation property) to Mount Carmel Foundation while retaining the right to live there for life, all while enjoying possible tax advantages.

Learn more by visiting our planned giving website at **legacyMCF.org.**

This information is not intended as tax, legal, or financial advice.
Please consult your personal advisor for guidance specific to your situation.

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