

# Making *A Difference*

Twenty-fifth Edition • Fall 2016

## From the Foundation President



Here is the text of a retirement letter that I submitted to the Board of Trustees of the Lutheran Homes of South Carolina Foundation Board on August 2.

Dear Members of the Foundation Board of Trustees,

For the past fourteen years I have had the privilege and joy of serving as the lead staff person for the Lutheran Homes of South Carolina Foundation. I have found great meaning in serving in that role. Because the Foundation is making a difference in the lives of older adults and hospice patients, some days I feel like I am doing as much ministry as I did when I was a parish pastor.

While I love my work, two upcoming events have made it clear to me that the time is right for my retirement. Later this month I will celebrate my 70th birthday and two months from now will mark the end of the second year since my stroke, which made it necessary for me to work primarily from home. Although I do not think the Foundation has been negatively impacted yet, primarily because of the hard work of the Foundation Staff, I do think we will soon reach the point when my inability

to visit donors in person will begin to take a toll on fundraising.

Therefore I am submitting this letter notifying you of my retirement effective February 28, 2017. I believe giving seven months notice will give you ample time to complete your search for a new President and CEO.

In closing I want to thank each of you for the wonderful support and encouragement you have provided through the years and especially during the past two years. Your concern and care have meant so much.

Please know you will be in my prayers as you work to fill the position and in the coming years. Be assured Ann and I will continue to be supporters and donors.

Sincerely,  
Bob

**The Board has begun a search for a new President and CEO following the guidelines outlined in the Executive Leadership Transition Plan.**

**In gratitude for your support and generous gifts during the past fourteen years,**

Sincerely,

**The Rev. Robert G. Coon  
President and CEO**

## Charity Navigator

After adopting a new rating system, Charity Navigator recently announced that the Lutheran Homes of South Carolina Foundation has earned a second consecutive coveted 4-star rating for sound fiscal management and commitment to accountability and transparency. Receiving four out of a possible four stars indicates the Lutheran Homes of South Carolina Foundation adheres to good governance and other best practices that minimize the chance of unethical activities and consistently executes its mission in a fiscally responsible way.

Receiving this “exceptional” rating from Charity Navigator, America’s largest and most utilized independent evaluator of charities, differentiates Lutheran Homes of South Carolina Foundation from our peers and demonstrates to the public we are worthy of their trust. As the nonprofit sector continues to grow at an unprecedented pace, it is becoming even more important that donors know which charities can be counted on to help them achieve their charitable intent.



**Mission Statement** The mission of Lutheran Homes of South Carolina Foundation is to support the ministry of Lutheran Homes of South Carolina by enabling donors, who care about older adults and hospice patients, to achieve their philanthropic goals and by being a faithful steward of their gifts.

## Some Fun Facts About Our Long-Term Donors



*A recent search of our donor data base by Melanie Gregg, our Donor Relations Coordinator, revealed the following fun facts about our long-term donors.*

- We have 181 donors (individuals/couples) who have made a gift for at least 10 consecutive years as of this fiscal year. 83 are current employees.
- We have 26 donors (individuals/couples) who have donated for at least 15 consecutive years as of this fiscal year. Four are current employees.
- We have 14 donors (individuals/couples) who have donated for at least 20 consecutive years as of this fiscal year. One is a current employee.
- We have 68 donors (individuals/couples) who gave their first gift on or before 12/31/1996 and their last gift was given in this fiscal year, but may not have given in consecutive years. Two are current employees.

## Innkeeper Legacy Society

Friends of Lutheran Homes who make us aware of their plans to leave a legacy of care through a will, gift annuity, charitable trust, life insurance policy or retirement plan may remain anonymous or give permission for their names to be included on the roll of the Innkeeper Legacy Society. We are grateful for the following individuals and couples who have made the Foundation aware of their planned gifts:



Anonymous (8)	Jim & Jewell Eanes	Mr. Reuben C. Ott
One New Member	Mr. & Mrs. Curtis Easter	The Rev. Sherry Owensby-Sikes, BCC
Mr. & Mrs. Ernest L. Beck	The Rev. Dr. Derald & Mrs. Vicky Edwards	The Rev. Dr. & Mrs. Harold Park
The Rev. H. Gene & Frances Beck	The Rev. Mary Mappus Finklea	Dr. Donna Millar Potts and Dr. David Potts
Mr. & Mrs. Luther C. Boliek	Jaime and Karen Fivecoat	Mr. J. H. "Jack" Richardson, Jr.
Mr. & Mrs. Perry Bouknight	Mr. Duane J. Gemar	Mr. & Mrs. William T. Ryan, Jr.
Mrs. Kaye Bradley	Mr. & Mrs. Edwin B. Hill, Jr.	Mrs. Mary R. Schaeffer
Mr. & Mrs. Mark C. Buchanan	Mrs. Carolyn Hooker	Mrs. Ned (Mary) Schall
Dr. & Mrs. Raymond S. Caughman	Mr. Parke B. Horton	Mr. Walter A. Sigman, Jr.
The Rev. Dr. & Mrs. Boyd F. Cook	Ms. Marjorie A. Howarth	Mr. & Mrs. George W. Smyth, Jr.
The Rev. & Mrs. Robert G. Coon	Mrs. Barbara Keil	David & Susan Troutman
Mr. Charles & Mrs. Joan Cope	Mrs. Marie Kleckley	Mr. & Mrs. J. J. Warren
Mrs. Ann K. Dasher	Mr. & Mrs. Mark H. Lee	Dr. Sandra S. Watson
Ms. Kaye D. Derrick	CDR Steven M. Lofton, USN-Ret	Mr. Gerald E. White
Ms. Denise L. Dickinsen	Mr. & Mrs. Morris S. Morton	Mr. and Mrs. Christopher Yetter
	Ms. Dolly Nethercot	

Please call the Foundation at **800.756.9443** or use the attached envelope to tell us about your planned gift or receive information about establishing one.



## Grants Continue to Make a Difference

*Grants received since the last issue of Making a Difference include...*

\$3,749 from the Lee Richard "Dick" and Helen Stockman Davis Fund at the InFaith Community Foundation for the Heritage at Lowman

\$6,750 from The Exchange Club of Charleston for subsidized care at the Lowcountry Office of Lutheran Hospice

\$1,000 from the Holy Trinity Lutheran Church Endowment Fund, Anderson to the Lutheran Homes of South Carolina Foundation for subsidized care



## Jerry Zucker Charleston Ride for Hope

The 2016 Jerry Zucker Charleston Ride for Hope will be held on October 9. Lutheran Homes of South Carolina will once again have several riders participating in this ride, which raises

funds to fight cancer. Since the inception of this ride, Lutheran Hospice has received \$48,500 to provide care for cancer patients needing financial assistance.



## Estates and Bequests

Gifts from estates and other planned giving instruments have played a vital role in the 100-year history of Lutheran Homes and its predecessor ministries. Since the last issue of this newsletter, the Foundation has received funds from planned gifts established by the following:

**Ann S. Powell**  
for the Heritage at Lowman

**Martin Glaize/Bethel Lutheran Church,**  
Winchester, VA  
for the Heritage at Lowman

**Betty B. Kinard**  
for Franke at Seaside

We are grateful that these faithful supporters chose to leave a legacy by naming one of our ministries as a beneficiary of a planned gift.

## Looking for a Unique Charitable Deduction?

The Foundation now accepts vehicles such as cars, vans, trucks and golf carts that are in good working condition to benefit the ministries of Lutheran Homes. All vehicle donations are accepted in accordance with the Internal Revenue Service Code. Contact Melanie Gregg at [foundation@lhomes.org](mailto:foundation@lhomes.org) or **800.756.9443** for more information.



**THRIVENT**  
FINANCIAL®

**Thrivent Choice** encourages eligible members to recommend where Thrivent Financial donate portions of its charitable outreach funds each year. The amount that can be directed is based on a member's insurance premiums, contract values and Thrivent Financial volunteer leadership. Thrivent Choice has

contributed \$28,523 to Lutheran Homes since the inception of the program.

If you are a Thrivent member, please go to [www.Thrivent.com/ThriventChoice](http://www.Thrivent.com/ThriventChoice) or call **800.847.4836** to direct your Choice Dollars to Lutheran Homes of South Carolina.

## Bank Drafts and Credit Card Payments

The Foundation can now accept one-time and recurring contributions through bank drafts and credit card payments. Please contact Melanie Gregg at [foundation@lhomes.org](mailto:foundation@lhomes.org) or **800.756.9443** for more information about these programs.



## Purpose Statement

*Making a Difference* is an official publication of the Lutheran Homes of South Carolina Foundation, Inc. designed to make donors and friends of Lutheran Homes aware of Foundation developments. Call Melanie Gregg at **800.756.9443** or email [foundation@lhomes.org](mailto:foundation@lhomes.org) if you no longer wish to receive this newsletter.

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## Planned Giving 101



Planned giving is the process of making a significant charitable gift as a part of a donor's financial or estate plan. Planned gifts take a number of forms. There are outright gifts of assets such as appreciated securities or cash, and other types of planned gifts that provide various financial benefits on top of tax deductions for donors. When it comes to planned giving, you may know more than you think you know.

Bequests, or gifts made through a will, provide at least two-thirds of the deferred gifts given to charity. Bequests are easy to set up in a will, often with only one or two sentences. They are the cornerstone of most estate plans and are among the easiest ways to arrange a gift of support to ministry.

Life insurance is another wonderful yet often overlooked tool for leaving a legacy. A gift can be set up by naming a charity as a beneficiary of all or a portion of the

policy's proceeds. A donor could even give a policy outright to charity to cash it in or hold it until a later date. A simple change of beneficiary form makes this an easy gift planning tool.

Individuals with a retirement plan, whether through their employer or held independently in their own Individual Retirement Account or pension plan, can select charity as a whole or partial beneficiary of the remaining balance. Often these plans are exposed to high tax rates upon transfer to family members, so these are an excellent choice to consider for charitable intent and to avoid added taxes.

Planned Giving is a form of stewardship for the future. You can contribute assets accumulated during your lifetime to perpetuate a legacy of great value and meaning. A planned gift is the ultimate and often easiest method of making a difference in the lives of our residents and the ministry of the Lutheran Homes of South Carolina Foundation. We welcome you to learn more information by contacting:

**Ernest Beck, CFRE**  
*Director of Planned Giving*  
**843.856.4718 • [ebeck@lhomes.org](mailto:ebeck@lhomes.org)**



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