

# YOU CAN

An estate gift can enable residents to impact Jefferson's Ferry beyond what would be possible during their lifetimes.

Most anyone can plan a legacy at Jefferson's Ferry.



# JOIN YOUR NEIGHBORS

*"There are at least two reasons I decided to include Jefferson's Ferry in my will. One is that I believe "paying it forward" contributes to building community. A second is that I believe reducing various insecurities (e.g., food, shelter) helps to maintain civility."*

- Rita Sakitt

*"We included Jefferson's Ferry in our estate plan to help it remain Long Island's premiere Life Plan Community. Our wish is to be among those who have discovered...that love, compassion, and wisdom are the greatest treasures on earth—qualities so abundant in our wonderful neighbors at Jefferson's Ferry."*

- Pauline & Gary Bencivenga



— Jefferson's Ferry —  
FOUNDATION

One Jefferson Ferry Drive  
South Setauket, NY 11720  
631.675.5507

[jeffersonsferry.org/foundation](http://jeffersonsferry.org/foundation)



# JOIN THE HERITAGE SOCIETY

Plan an Estate Gift for Jefferson's Ferry



— Jefferson's Ferry —  
FOUNDATION

# HOW

# THE PROS

# DO IT

*How to join the Heritage Society?  
Inform us that your estate plan  
includes a gift to the Jefferson's  
Ferry Foundation.*

To ensure that your wishes are carried out as you intend, discuss your estate gift with the Foundation. While estate gifts to Jefferson's Ferry Foundation are free from federal estate tax, there may be ways to avoid or reduce other taxes.

Informing us of your estate gift intention allows the Foundation to properly honor and express our gratitude for your generosity.



## GOOD POINTS. ADVANTAGES. ARGUMENTS FOR.

*A planned estate gift can benefit both  
you and the community you love.*

- Create a legacy and make a lasting positive difference for Jefferson's Ferry.
- Planned gifts can sustain the work of the Jefferson's Ferry Foundation.
- Direct a gift of any amount while retaining full control of your assets during your lifetime.
- Retain the flexibility to modify your intended gift at any time.
- Create an outright gift from your estate entirely free from federal estate taxes, permitting the Foundation to utilize the full amount of your gift.
- Become a member of Foundation's Heritage Society and enjoy special member experiences.



*There are innumerable vehicles to  
convey an estate gift to the Jefferson's  
Ferry Foundation. Call or stop-by the  
Foundation office to discuss the  
possibilities.*

- **AN OPPORTUNITY UNIQUE TO JF**  
Designate all or a percentage of your entrance fee refund to the Jefferson's Ferry Foundation.
- **A BEQUEST IN YOUR WILL**  
Include a gift of a specific dollar amount or percentage of your estate to the Jefferson's Ferry Foundation. Direct all or a percentage of the balance or residue of your estate to the Jefferson's Ferry Foundation.
- **BENEFICIARY DESIGNATION**  
Designate the "Jefferson's Ferry Foundation" as the beneficiary of a retirement account, insurance policy or any account that permits a beneficiary designation.
- **APPRECIATED ASSETS**  
Provide for a gift of securities, real estate, or other property.

