



Gifts from a Will or Trust: Supporting the Future

Harold & Vivian's Story

They lived the majority of their married life in a three bedroom Victorian home not far from downtown Milwaukee. It was filled with a lifetime of special memories. But the house was becoming a lot to manage and, with gentle encouragement from family and friends, they decided to search for their next home.

Harold and Vivian visited many retirement communities and found Three Pillars Senior Living Communities in Dousman, Wisconsin. They sold their beloved home, downsized their personal belongings, and moved into Village on the Square right before Harold's 80th birthday.

While it took a little while for them to settle in, they soon found a new routine which allowed them to truly enjoy life to its fullest. All they had to do was to walk out their apartment door and into a variety of daily options which could include coffee hour with other residents, or a day trip to a number of entertainment venues. After several months they had established a whole new network of friends. They engaged in all that their new home had to offer. Their children noticed a visible change in their parents and they were very pleased because their mom and dad were happy.

Harold: *We are blessed! That just sums up the way we feel. We admit, we were hesitant about making this big of a move at this stage of our lives. But, Vivian and I both agree that it's the best decision we have ever made!*

Vivian: *There is just so much for us to do. Or, if we don't feel like doing anything, we have the ability to just relax and enjoy this beautiful campus. We don't have to worry about anything in terms of mowing the lawn, shoveling the sidewalk, or washing the windows!*

Harold: *That is why, when our financial planner suggested that it may be worth considering including a charity as a beneficiary in our estate, we immediately thought of Three Pillars.*

Vivian: *Of course, there was a family discussion. We not only wanted the kids to know about our decision, but we also wanted to share a life lesson: the art of giving back and how important it is to us to express the gratitude that we hold in our hearts by creating this gift of legacy.*

Harold: *We also explained to the kids how our estate would actually benefit from a charitable beneficiary. Because of our personal financial situation, the tax implications to our estate and to them, as heirs, were significant. It was also very easy to do. We simply added a paragraph to our will, which was provided to our attorney by Three Pillars' Development Department.*

Vivian: *We decided that we wanted our bequest to benefit the Resident Support Fund. This fund has been established for those residents who have outlived their financial resources. It's a longstanding tradition of Three Pillars to not ask residents to leave because of inability to pay for care. It's a mission that we are passionate about supporting, and we are fortunate that we can.*



**If you would like more information about naming
Three Pillars Senior Living Communities as a beneficiary in a will or trust,
please contact the Development Department at 262.965.7294.**