

WILLS AND GIFTS COMMITTEE PROGRAM 2016-2017

My Brothers:

One of the most satisfying things that we can do as Masons is to leave a legacy for someone or something we care deeply about. Over the years many Brethren and friends have included a charitable provision in their wills or made a direct cash donation to our Masonic Home of Florida, their Lodge, or one of the youth organizations. The results of those gifts have allowed us to influence the lives of many of our fellow Brethren, Widows, or youth within our community.

The Wills and Gifts Committee is primarily charged with ensuring a sound financial future for our Masonic Home by educating both Masons and non-masons alike in the various estate planning vehicles available. There are several categories of gift giving available to anyone who wishes to make a donation to our Masonic Home.

Bequest Gifts: For many of us a charitable bequest is the easiest and best way to make a gift to our Masonic Home. By means of your will or other estate plan, you can name the Masonic Home as the beneficiary of a portion of your estate or of particular assets in your estate. Giving by bequest costs nothing now, yet it may give you a great deal of satisfaction to know that your future gift will live on.

Charitable Gift Annuities: These gift annuities will provide you (and/or someone you designate) with income for the rest of your life, avoid capital gains tax, and leaves a lasting gift to our Masonic Home. A portion of this income stream may be tax-free and you will receive a charitable deduction for the value of your future gift to the Masonic Home. Our Grand Lodge has created a brochure entitled "The Charitable Gift Annuity Program" that will help educate potential donors about the advantages of utilizing this gifting strategy. We have also gathered a list of Brothers that are willing to speak to potential donors on an individual or group basis to provide further information regarding this program. You may contact me directly or a Zone Chairman in order to arrange for an educational workshop in your area.

Outright Gifts: These gifts include one-time or ongoing donations of cash or other assets that you wish to donate to the Masonic Home. Typically these gifts have favorable tax advantages associated with them which may be received right away.

Donating Online: You can make a donation today by visiting the Masonic Home of Florida's website and click on the "Donate Now" icon. You may choose to contribute to several of our recognition programs on behalf of yourself, your Lodge, or a loved one. If you shop online through Amazon, you can sign up for their Amazon Smiles Program and designate one of the Florida Masonic Charities to receive 0.05% of your purchase.

In order to assist in making decisions regarding planned giving, Grand Lodge has developed a brochure entitled "A Guide to Wills & Trusts in Florida." The District Committee Chairmen should obtain an ample supply to disseminate among their individual Lodges. The District Deputy Grand Master's selection of an attorney or estate planning professional to present the program is encouraged. Also, Grand Lodge can assist you in contacting an attorney, within the Fraternity, who is willing to assist Masons and non-masons in making charitable bequests to the Masonic Home.

It is important to note that non-members of the Fraternity, once having become familiar with the benevolent nature of our Masonic Home, made a number of large bequests over the years. Thus, you may wish to discuss our Masonic Home and its accomplishments at Open Meetings, emphasizing that it is only the interest derived from the Endowment Fund which funds our Masonic Home's Annual Budget. Perhaps of equal importance is the fact that our Masonic Home, unlike many charitable facilities, has no corporate sponsors, nor does it receive any Federal or State assistance.

In addition to the above, in an effort to provide for greater outreach for this program, it is my hope that information regarding wills and gifts will be made available to each District Deputy Grand Master for distribution to each District Committeeman. It is my intention to make distribution to each Zone Chairman as well. The more information that is out there, the greater the chances for positive response.

We would like to thank, in advance, those members of the Fraternity and non-members who have found it in their heart to ensure a sound financial future for our Masonic Fraternity by making charitable gifts and bequests in the course of their estate and tax planning.

Fraternally,

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