

BOONE COUNTY SENIOR SERVICES FOUNDATION, INC.

LEGACY

Fall 2023



Benefiting from the diversity of BCSSI's services and now giving back as a donor and volunteer has been both rewarding and impactful for Lebanon resident Colleen Thomas.

Several years ago, Colleen was looking for a local connection that could help her locate an attorney to finalize her Will and Trust. She contacted BCSSI and had the opportunity to meet with Director of Personal Services, Cindy Hickson. Colleen also inquired about our Guardianship program and later worked with Cindy to set-up BCSSI as her Power of Attorney (POA) to handle her life choices if/when she is unable.

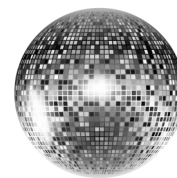
As time progressed, Colleen learned about the Foundation's Legacy program and made the decision to leave a portion of her Estate to BCSSI after she passes. Colleen has a special engraved leaf with her name, placed on our beautiful Legacy Tree.

Earlier this year, Colleen accepted a position as a Board Member of the Boone County Senior Services Foundation. She enjoys volunteering at our Senior Health & Wellness Expo and the Holiday Silent Auction. She also joined the BCSSI Travel Group on a trip to Gatlinburg this summer and to The Biltmore Estate this fall. Colleen stated "I enjoy the diversity of programing and the opportunity to make a positive difference in our community. I encourage others to support the efforts of both BCSSI and the Foundation."

Thank you Colleen for volunteering your time and supporting our efforts through our Legacy program.



Happy Holidays from BCSSI and the Boone County Senior Services Foundation. We are thankful for your financial support so we can continue serving older adults in Boone County.



SAVE THE DATE: BCSS Foundation Legacy Dinner

Saturday, April 27th, 2024
Moontown, Whitestown
A night of fellowship and
good food with a fun disco theme!
Proceeds support the efforts of the
Foundation.

This Legacy publication is from the Boone County Senior Services Foundation, Inc. (BCSSF) whose mission is to grow a fund so Boone County Senior Services, Inc. (BCSSI) can continue serving older adults in Boone County.

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BOONE COUNTY

Senior
Services
Foundation



Estate Planning Overview

Last Will & Testament

- Disposition of your property (home, bank, accounts, household items) after your death
- Choose who inherits, what they inherit, and name personal representative in charge of administering estate
- Without a Will, Indiana Law of intestacy determines who inherits from estate
- To be valid, a Will must be signed by you and signed by two disinterested witnesses who watch you sign and watch each other sign

Financial Power of Attorney

- Appoint the person(s) who should manage your finances if you are unable to do so
- Choose someone who you trust for this position
- Can take effect immediately upon signing or only when your doctor determines incapacity exists
- It must be signed in the presence of a notary public

Healthcare Power of Attorney/Advance Directive

- Appoint the person(s) who should make your healthcare decisions if you are unable to do so
- Recent changes in the law expand what can be included in Healthcare POA/Advance Directive
- Choose someone who you trust for this position

- Can take effect immediately upon signing or only when your doctor determines you are incapacitated
- Speak to doctor if interested in DNR/POST forms
- It must be signed in the presence of a notary public

Without Estate Planning

- Without a Will the law of intestate succession determines who inherits from the estate
- Without a financial power of attorney or healthcare directive, it may be necessary for a family member or friend to petition the court for guardianship. A guardianship is much more expensive and time-consuming process than appointing an attorney and healthcare representative



You should consult with an attorney to prepare an estate plan that fits your specific circumstances.

*Information prepared by:
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Kruse, LLC*



"Boone County Senior Services lives up to its name in spades. It offers so many opportunities to the seniors in our community. Our community is uniquely blessed to have this facility, and the staff is

outstandingly compassionate and helpful. Any donations are gratefully accepted and applied to the ongoing work of BCSSI and the Foundation."

~Russ & Helen Roberts, Lebanon

Thank you to Jane Dean and Richard and Jeanne Wait for their generous donations to the Foundation's Legacy Program. Each donor is recognized with their name engraved on a leaf and placed on our Legacy Tree.



If you would like to learn more about leaving a

gift to the Foundation in your Will, please stop by or call BCSSI. We will be happy to talk through how you can make a difference in the future of seniors in Boone County through a special Legacy gift.



Thank you our Legacy Donors who are honored on our Legacy Tree:

The Russ & Helen Roberts Family

Bonnie Klingler

Duane & Kim Fortune

Bill & Sharon Walker

Rick Whiteman & Ed Mitro

Jane Hammock

Bob & Anita Bowen

John Cowan

Colleen A. Thomas

Patricia Riebeling

Ruth Brookshire Charitable Foundation, Inc.

Johanna Mohringer

David & Erin Herr

Jane Dean

Richard & Jeanne Wait

Boone County Senior Services Foundation Memorial & Donation Form

Please accept my gift in the amount of: \$ _____

My form of payment is: _____ enclosed check made payable to BCSS Foundation

_____ credit card: _____ Visa _____ MC _____ Discover

Card #: _____ Exp. Date: _____

Your Signature: _____

My gift is in Memory or Honor (circle one) of: _____

Please send notification card to: _____

Street Address: _____ City, State, Zip: _____

Please mail this form & payment to:

Boone County Senior Services Foundation, Inc.: 515 CrownPointe Dr., Lebanon, IN 46052