

SCHMITT WOODLAND HILLS

WOODLAND *Views***A HALLOWEEN TRADITION**

Fall colors and Halloween, they just seem to go together, at least in Carol Stevenson's mind. Carol's Halloween "collecting" started in Illinois prior to the time she and her husband Steve moved to Wisconsin and the Richland Center area. In Illinois, Carol's father and Steve's mother lived across the hall from each other in a retirement home. This was an especially convenient arrangement during the holidays.

This was especially true at Halloween and this is when the "collecting" began. Initially, it was only the two of them that were dressed in costumes to celebrate the special day. It didn't take Carol long to recognize that some of the residents didn't have family visiting them much less help them celebrate on special days. They were basically alone, so Carol began to collect more costumes to help dress the residents that needed to join the Halloween party.

After Carol's dad passed away, she and Steve moved his mother Ada to Richland Center where she became a resident of Schmitt Woodland Hills. During this time, they had purchased property in the Richland Center area and had built a new home. Steve was splitting his time between Illinois and Richland Center.

When Steve's mother moved to Schmitt Woodland Hills the Halloween collecting started **BIG TIME!** Carol was always on the lookout for special deals at the after Halloween sales. She even began to enlist the help of local store managers to help her find bargains. They liked the idea of what Carol was doing and became willing accomplices in her mission to bring Halloween joy to these people. The collection of costumes, hats and masks really needed to expand because Carol was not only dressing



the Schmitt Woodland Hills residents but she also started the same tradition at Pine Valley Community Village.

Along the way Carol was able to convince her friends Margaret Van Der Molen and Dawn Stinebrink to join her and help with costuming the residents for their annual Halloween Party. The "three amigos" would load Carol's SUV full of costumes, mask and other accessories and head out for Pine Valley Community Village. When their party was over, they would pack everything back up and head for Schmitt Woodland Hills. Usually after a quick lunch all the costumes were unpacked again and the residents would be prepared for their afternoon Halloween party. By the time it was all over it would always be a long day. This went on for 28 years. Years of fun, laughter and friendship.

In Carol's words, "Then it happened, I was one of the Old Ones Too! It was hard to stop but, my mind was young and my body just didn't agree. I'll always treasure those great memories of all the people, "friends" really, I met at Schmitt Woodland Hills and Pine Valley, the great staff and all the residents. To my great friends Dawn and Margaret that helped every year, I couldn't have done it without you two. Thanks Schmitt Woodland Hills for all the memories."

It certainly was a great 28 years. We can only imagine how many residents were transformed into pirates, princesses, witches and cows during those 28 years. But even more importantly, how many residents went to bed on Halloween night with a smile on their face and a fond memory of Halloweens past. On behalf of everyone at Schmitt Woodland Hills, staff and residents alike, we thank you for the memories!



# CARING PEOPLE MAKE A DIFFERENCE BY MELANIE RING

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There is no other long-term health care organization like Schmitt Woodland Hills. At least, that is, in my experience. Over my lifetime I have lived in multiple regions of our country and have called Southwest Wisconsin home for the past 12 years.

What separates Schmitt Woodland Hills from facilities that have cared for my own close relatives and friends? Quite simply, it is a familial love that is imbued in every aspect of what we do.

Relationships of staff with residents go beyond physical care, medication management, and recording food/fluid intake.

In addition, there is a concerted effort to discover what about the individual brings them a sense of well-being, happiness, and a feeling of contentment.

Whether it is sharing memories, common interests, telling jokes, giving a gentle back scratch, or unexpectedly producing that universal cure-all (otherwise known as chocolate), everything is a team effort to achieve this goal.

Schmitt Woodland Hills is not just some sort of a facility, but a pleasant love-filled home. A retreat, if you will, from the realities of our world for both residents and even staff.

And while Schmitt Woodland Hills is remarkably unique, a nagging thought persisted during my reflections. As if I have witnessed or have been part of a similar scenario.

The memory came to me suddenly of medical treatment I'd received at a military hospital. So many of the medical staff were quite literally combat tested.

And are we not at present, as a Schmitt Woodland Hills community, waging our own battle against a deadly

pandemic? Do we not make sacrifices to hold the line and force back an invasion that would cause undue harm to our comrades and those we are protecting?

Each and every department has its objectives that must be achieved that are critical to win our current campaign over this COVID19 virus.

How do I know that our organization will prevail? Like anything, one must never overlook the minor details. Nursing, environmental services, therapy, social services, activity coordinators, dietary, and the administration all know that our residents are why we are here. When a situation arises, nothing is beyond anyone's purview. We all assist where we are needed. Every aspect of care is all of our responsibility, no matter our job title. We ensure that no resident is ever left behind.

And what of our residents? Are they simply a group of individuals for which to be treated and cared? Certainly not.

Our residents are living, breathing monuments to what it is to be resilient and to make sacrifices. So many of them have been witnesses in their lifetime to war, pandemics, economic disasters, and great personal sufferings and tragedy. And yet here they are. Survivors who have thrived in spite of times of great darkness. And so, every day, our residents give us hope that life continues on, good will prevail, and our time is as fulfilling as we choose it to be.

So, these are some of the myriad of reasons that set Schmitt Woodland Hills apart from other long-term treatment organizations. That is how I know that our loving presence in the community will continue to serve generations yet to come.

## CARING PEOPLE MAKE A DIFFERENCE AWARD WINNER

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This was the second year for our "Caring People Make a Difference" essay contest. We had three entries in this year's contest with the winner taking home a check in the amount of \$500.00, just in time for the Christmas shopping season.

Our winner this year was Melanie Ring, a CNA who works on the 2nd floor in the Health Center. Congratulations to Melanie! Unfortunately, due to the pandemic, we are no longer having regular in-service meetings where the winning essay would have been read. Melanie will be presented with her check in the amount

of \$500.00 and her essay will be re-printed as part of an upcoming staff newsletter. Besides being reprinted here in the Woodland Views, copies of her essay will also be made available at the front desk if staff or residents would like to read it as well.

Essays for the 2021 Caring People Make a Difference contest may be submitted any time after January 1, 2021. We will be awarding the \$500.00 prize again in November of 2021. We hope to see more great entries again next year and remember **Caring People Really Do Make A Difference.**



## INSPIRATION: “THE REASON FOR THE SEASON” BY CRAIG PEACH

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Certainly the Christmas season gives us many opportunities for joy. We are surrounded by reminders that this is to be a season for being glad.

One woman, Wendy Wright, discovered the joy of the Christmas season in one of the most unlikely of places - a homeless shelter in her city. Wendy and some others from her church visit homeless shelters each year to sing Christmas carols. The people living in homeless shelters have had their childhood dreams shattered, says Wendy. They live with very little hope. “In that setting,” Wendy says, “songs of snowmen and Christmas wish lists and hearty good cheer ring hollow.” What does ring true is the good news of a Savior.

At one of the shelters at which they were singing, Wendy met a man she says she will never forget. The group had been singing their Christmas carols in a smoke-filled, noisy room. They were ready to wind it all up when a homeless man about fifty in a soiled jacket approached Wendy. She recalls that this man’s “perceptions of things, due either to ill health or some chemical substance, seemed doubtful.” But he asked Wendy if she would sing his favorite Christmas song with him. The song was, “O Holy Night.”

Wendy agreed and they began singing. The crowded room gradually grew silent as the two of them raised up their voices together. “O Holy Night! The stars are brightly shining, It is the night of the dear Savior’s birth...”

The man in the soiled jacket leaned on the edge of a tattered sofa about three feet from Wendy singing with his eyes closed. As he sang Wendy noticed a change come over the man. “The tired creases of his street-weary face softened as he sang,” she recalls.

As he continued to sing, his face shone and tears fell gently from his lowered eyes. “I knew, at that moment,” Wendy says, “that his longing and mine were one...it is etched on the human heart,” That longing is for a Savior.

*If we celebrate the true reason for the season - Jesus - we will know real joy.*

## WESTVIEW ASSISTED LIVING RENOVATIONS

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Do you like to wake up in the morning to the smell of bacon and eggs cooking? Or Chocolate chip cookies baking? This is what we are aspiring to do in our Westview Assisted Living Community by adding a full kitchen in the dining room. We are confident that appetites will improve and the residents will take advantage of increased opportunities for socialization by coming to the dining room to see what smells so good.

The new commercial grade stove hood has been fabricated and installed. We have received new dining room chairs and installed new window treatments in the dining area. New cabinetry has been ordered and a movable kitchen island will be constructed.

Now imagine you have memory issues and you are walking down a hall where all the doors look the same. Which one is yours? We are planning to add “door skins” to resident rooms. These will make the doors different and easier for residents to find the right one. Less institutional also. We always strive to make things homier for our residents. Our plans also include adding showers to many of the private resident rooms.

In the plans as well, is an initiative to convert the south wing of Westview into a memory care unit with a self-contained outside area which will allow the residents to go outside safely. All these changes will make residents feel at home and more secure.

The Westview Renovation Project is actually a series of smaller projects within the larger project. Work will continue on this major project well into 2021. Undertaking a project of this magnitude during the pandemic, with all the complications that go along with it, is quite an undertaking but, we are committed to moving forward.

Our major fundraiser, the annual Tommy P. Harvey Memorial Golf Outing got us off to a good start for the renovation project. The Golf Outing was very successful considering it was also impacted by the pandemic. Although we are continuing to raise funds to support this project, we are positioned in such a manner that we can continue to work into 2021. We want to express our deepest gratitude to those have chosen to support this project and the impact it will have on our residents.

# COVID-19 UPDATE

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It was just over 33 weeks ago that the first edition of the Family Ties was emailed to the families and other loved ones of all of our Schmitt Woodland Hills residents. That would have been the week of April 19th. The old saying, “If I only knew then what I know now”, would certainly be applicable. By the time we hit the third week in April it was becoming abundantly clear that the COVID-19 pandemic was going to be something like we had never seen before. Something else was becoming very clear as well. We were going to need to find a way to better communicate with our resident’s families, to keep them abreast of what was happening inside SWH, to assure them that their loved ones were being well cared for and to also keep them informed of the ever-changing landscape of regulatory issues that were being thrown at us, seemingly by the hour.

Out of this chaos was born the “Family Ties” e-newsletter. The first thing we realized was how inadequate our list of family email contacts was. To rectify this, we immediately embarked on a campaign to update this list and to make sure that every family member was being informed about what was happening inside SWH. We wanted to be totally transparent and to make sure our families were well-informed.

During this 33-week period, the Family Ties has become a flexible communication tool. There were times when it was used on an “as needed” basis. There were times when it was a daily publication, other times it was a weekly publication and now it has morphed into a three day a week publication. But no matter how often it was published its sole purpose was to keep our resident’s families informed and reassured that their loved ones were receiving the best care possible.

In the early days of the pandemic many folks expressed concern that our policies and protocols were unfair, far too strict and that we were over reacting. We did our best to communicate to our families that we were, for the most part, following State, County and/or CDC guidelines and doing our best to protect the residents and our staff. In retrospect, we believe we charted the right course. Through this entire 33-week period we have had 3 positive tests from residents in our Westview Assisted Living Community who have recovered. We have now gone over two weeks without any new positive test results from the residents in Westview. All quarantines and extraordinary restrictions have been lifted in Westview.

From March, when the pandemic really took off until now, we have had only 3 positive tests for any of our residents; 3 in Westview and no positive test results in the apartments or the Health Center. We have had a number of positive test results among our staff but we have followed very strict guidelines and protocols when staff have tested positive. Our primary objective from day one was to keep our residents safe and the best we can say at this point is “so far so good”. Hats off to our caregivers and support staff for all they have done to make this possible. God bless you all!



*Did you Know....*

*You can donate to us on Amazon Smile?*

**Log in using:**

**Smile.amazon.com**

**Place your order, and a portion will  
come back to us.**

**amazon**smile

**You shop. Amazon gives.**

# LOOKING “DOWN THE ROAD”

Looking down the road, we all hope and believe that we will be returning to a more normal world at some point. As part of our planning for that wonderful day Schmitt Woodland Hills entered into an Agreement with the ADRC to lease a small wheelchair accessible bus. There is grant money involved in this program which makes the lease very affordable.

The bus can accommodate 8 passengers and 4 wheelchairs. The seating is very flexible and can be altered to accommodate more regular passengers with less wheelchairs. We envision using the bus for Dining Out trips, field trips to Rotary Lights in the Park, parades and other activities within the community and surrounding area.

We are all praying that we can put the bus into service sooner rather than later. It is our intent to be ready when the time comes.



## THINK SPRING!

It looks like another trishaw season is in the books. We would like to thank all of our caregivers who were involved in helping the residents go out for a ride this past summer. We couldn't do it without you. Your assistance is essential for the success of the program and the residents always seem to love going out for a ride. So once again, THANK YOU FOR ALL YOU DO!

We have some exciting news to share for our riding season next summer. There is a new version of the trishaw which is especially designed for individuals who rely on a wheelchair. This new trishaw, called the Veloplus, is designed to carry wheelchairs. The passenger is not required to be transferred between the wheelchair and the cycle. The Veloplus is manufactured by Van Raam, the same people that made our current trishaws.



We are working with a bike shop in Madison who is a Van Raam dealer to exchange one of our current trishaws that we have never used for a Veloplus. The latest word is that they have one coming in a container from Denmark in November. We will be doing the exchange when this new trishaw comes in. It will be nearly an even swap so this is going to work out great for everybody.

Just think, no more transferring of passengers. This new trishaw has a ramp and a power winch. Just load the wheelchair, lock it down and off you go! This should make it much easier on the caregivers who help with the residents. Hopefully this will increase ridership and allow us to serve more residents. We can't wait for spring!

# ACTIVITIES DEPARTMENT SUPER STARS KEEP RESIDENTS ENGAGED

## FIRST EVER MOBILE HAPPY HOUR A SUCCESS

On Thursday September 17, 2020 a new Schmitt Woodland Hills tradition was born. On that day, all the residents of SWH were greeted with a surprise when they answered the knock at their doors. When they opened their doors, they were greeted by their first ever mobile happy hour. Residents were offered a choice of snacks and beverages, something to suit almost everyone's taste. Not only snacks and beverages but toe tapping traveling juke box as well. Several residents were caught moving their feet to the music.

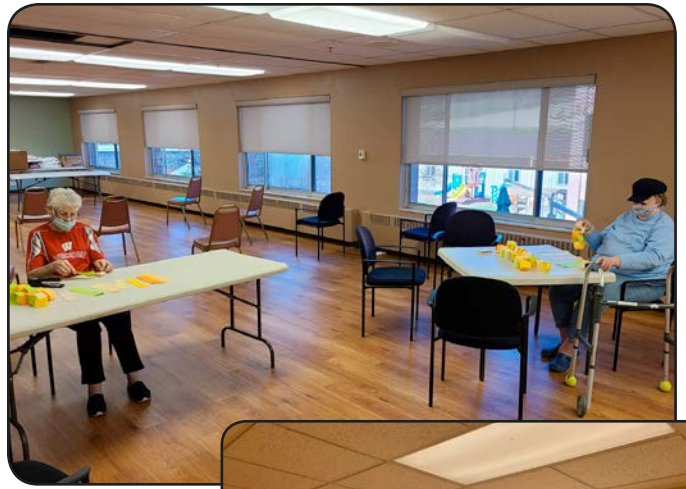
Thanks to John Tews and his Activity Team this Thursday tradition has become a huge favorite with the residents. The idea first arose out of a perceived need to get the residents out of their rooms and engaged with each other. It worked and now every Thursday the residents are waiting for that knock at the door. Plus, leave it to John to throw a new wrinkle in every now and then to keep the residents on their toes.



# CHAIN CONSTRUCTION

Unfortunately, one of the concerns with the pandemic and the amount of time it has stretched on, is the toll it takes on the resident's wellbeing. We are always concerned about what the increased isolation for the residents is doing to their health physical and mental health. This isolation not only puts added stress on our residents, it also adds to the pressure on our caregivers, their support people and it also puts added pressure on our Activities staff as well. Thank goodness John, Sharon, Craig and Aubrey, our Activities Department, always rise to the occasion when it comes to the residents and their needs. The last week in October Aubrey organized a colorful chain making activity and used the resident's handiwork to decorate various parts of the building.

Everyone who participated had a great time helping make the chains and dressing up the building as well.



# THE BLANKET BRIGADE

About two years ago, a small group of our residents began working with the Activity Department to make blankets for Project Linus, a national organization that helps distribute homemade blankets to children's hospitals, homeless shelters, and others in need. Though they were skeptical at first of being able to make a blanket in just half an hour, they soon came to find a love for the project and now make several blankets per month. Our initial small group has grown to include all areas of the building and several residents. We have even had to buy more pairs of scissors so all those interested would be able to work at the same time! We have completed over 50 blankets and show no signs of slowing down. Besides being a fun project, it is also one that gives purpose to our residents and allows them to help others, which is something we can all feel good about.



*Pictured from left to right: Residents, Edna Slayback, Eunice Moore, Jean Birkett, JoAnn Schmitz, Kate Crary, Fran Cooper, and Louise Schadauer.*

# CHRISTMAS STORY: FOR THE MAN WHO HATED CHRISTMAS

BY NANCY W. GAVIN

It's just a small, white envelope stuck among the branches of our Christmas tree. No name, no identification, no inscription. It has peeked through the branches of our tree for the past ten years.

It all began because my husband Mike hated Christmas. Oh, not the true meaning of Christmas, but the commercial aspects of it – overspending and the frantic running around at the last minute to get a tie for Uncle Harry and the dusting powder for Grandma – the gifts given in desperation because you couldn't think of anything else.

Knowing he felt this way, I decided one year to bypass the usual shirts, sweaters, ties and so forth. I reached for something special just for Mike. The inspiration came in an unusual way.

Our son Kevin, who was 12 that year, was on the wrestling team at the school he attended. Shortly before Christmas, there was a non-league match against a team sponsored by an inner-city church. These youngsters, dressed in sneakers so ragged that shoestrings seemed to be the only thing holding them together, presented a sharp contrast to our boys in their spiffy blue and gold uniforms and sparkling new wrestling shoes.

As the match began, I was alarmed to see that the other team was wrestling without headgear, a kind of light helmet designed to protect a wrestler's ears. It was a luxury the ragtag team obviously could not afford.

Well, we ended up walloping them. We took every weight class. Mike, seated beside me, shook his head sadly, "I wish just one of them could have won," he said. "They have a lot of potential, but losing like this could take the heart right out of them." Mike loved kids – all kids. He so enjoyed coaching little league football, baseball and lacrosse. That's when the idea for his present came.

That afternoon, I went to a local sporting goods store and bought an assortment of wrestling headgear and shoes, and sent them anonymously to the inner-city church. On

Christmas Eve, I placed a small, white envelope on the tree, the note inside telling Mike what I had done, and that this was his gift from me.

Mike's smile was the brightest thing about Christmas that year. And that same bright smile lit up succeeding years. For each Christmas, I followed the tradition – one year sending a group of mentally handicapped youngsters to a hockey game, another year a check to a pair of elderly brothers whose home had burned to the ground the week before Christmas, and on and on.

The white envelope became the highlight of our Christmas. It was always the last thing opened on Christmas morning, and our children – ignoring their new toys – would stand with wide-eyed anticipation as their dad lifted the envelope from the tree to reveal its contents. As the children grew, the toys gave way to more practical presents, but the small, white envelope never lost its allure.

The story doesn't end there. You see, we lost Mike last year due to dreaded cancer. When Christmas rolled around, I was still so wrapped in grief that I barely got the tree up. But Christmas Eve found me placing an envelope on the tree. And the next morning, I found it was magically joined by three more. Unbeknownst to the others, each of our three children had for the first time placed a white envelope on the tree for their dad. The tradition has grown and someday will expand even further with our grandchildren standing to take down that special envelope.

Mike's spirit, like the Christmas spirit will always be with us.

**Please consider making a gift to a charity  
of your choice this Holiday season.**

## CARDS AND BINGO

During the pandemic several "card clubs" sprung up among Westview and apartment residents. It seems that euchre was the game of choice.

As one walked around the building sounds of "N-34 and G47" could be clearly heard. John Tews, Activity Director, added a new twist to the traditional Bingo games. John called out the letters and numbers on the overhead pager as Westview residents marked their cards while sitting just outside their doorways.







*Tree of Continued Caring Memory Lights*

**Please return to:**

**Schmitt Woodland Hills Tree of Continued Caring  
1400 W. Seminary Street, Richland Center, WI 53581**

**Name of Donor:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City/State/Zip:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_ **e-mail:** \_\_\_\_\_

**Lights in Memory of:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Lights in Honor of:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please make checks payable to SWH. Thank you for your support.**

**Donations \$5.00 per light.**

*(please use separate sheet of paper if more room is required)*

# JACKIE'S JOURNAL: *Greetings Residents, Families & Supporters*

As we head into the holiday season, we would like to take a moment to reflect on 2020 and what an unusual year it has been. It has been eight months since we found ourselves at the beginning of this pandemic and it seems unrelenting with cases being at an all-time high. Despite these adversities, we appreciate your support and understanding as we've worked to manage the ever-changing regulatory environment that COVID-19 has delivered. Your ongoing assistance is appreciated more than ever as we proceed into the next few weeks.

Thanksgiving, Christmas, and the New Year holidays are times that we often associate with *togetherness and community*. This typically includes spending physical time with our loved ones and appreciating one another's company. This year may look slightly different as we continue to work to keep our residents, patients, and staff as safe as possible. In-person visits are difficult to facilitate given the associated state and federal guidance that is being provided at this time. Therefore, we are continuing to facilitate virtual visits, including on these special holidays. Through the use of added technology, we are confident that we'll be able to make these holidays as memorable as possible.



As we end this year, we are hopeful that we'll be able to enter into our new normal in the near future, which will include more personable visitation. The progress reported with the COVID vaccine as it enters into its final phases of review has been reassuring, as it will serve as an invaluable tool in being able to combat this deadly virus. Until this time, we will continue to make efforts to provide the feeling of *togetherness and community* by continuing to keep you informed of facility updates by way of the Family Ties emails, phone calls from our communications team when necessary and by facilitating virtual visits with your loved ones.

I would like to extend a personal note of gratitude for your attention to this message of coordinating virtual visits for the holidays. I realize that it may not be easy to accept, but I'm sure you can understand the rationale of supporting the health of everyone that resides and works at Schmitt Woodland Hills. If you have any questions, I'm more than happy to have a conversation and can be contacted at **606-647-8931**.

Thank you for your time. Be well and be safe.

Cordially,

*Jackie Carley, Executive Director*

## FOURTH ANNUAL CHRISTMAS GALA

Like so many other things in this most memorable year of 2020, our fourth annual Christmas Gala fundraising event had to be altered significantly because of the pandemic. As you may recall, this festive Holiday event was spearheaded by eight to ten "table captains" who invited seven special guests to join them at their beautifully decorated Christmas table for a wonderful lunch prepared by the Schmitt Woodland Hills Dietary Department.

Rather than let the tradition die, we decided to take it virtual for 2020. This year's version of the Gala will be a silent auction conducted on Facebook. The auction will start on Friday December 4th and end at midnight on Saturday December 12th. Many of the items in the auction will be Holiday table center pieces donated by last year's table captains including: Sheila Troxel, Lola Higgins, Linda Harlan Post, Joanne Amell and Jackie Carley. Other items such as Holiday baskets and additional center pieces were donated by Marsh McLennan Agency, Barb Harvey, Added Touch, A Seasonal Touch and Betty Unbehaun.

### SCHMITT WOODLAND HILLS

## Christmas Gala Auction



**Help keep the tradition of our Christmas Gala alive by joining us for our Facebook auction**

**December 4th through Midnight December 12th**

We will auction off Holiday centerpieces and other wonderful items graciously donated by individuals and local businesses.

*Consider making a gift to help us fulfill our mission of care for our senior residents.*

**SCHMITT WOODLAND HILLS**  
Retirement Apartments • Assisted Care • Therapy and Rehab • Skilled Nursing • House Calls  
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# WHAT IS PLANNED GIVING?

We hear a great deal about **Planned Giving** from not-for-profit organizations and other public institutions, especially at this time of the year. Couple that with the COVID-19 pandemic which has made it extremely difficult for the not-for-profit sector to raise badly needed funds required to execute their missions, whatever that might be. Because of the pandemic and the economic hardships it has forced on the not-for-profit community, I believe we will hear a great deal more about planned giving in the weeks and months to come. Therefore, we felt it would be appropriate to offer some basics of planned giving starting with a definition.

Quite simply, *planned giving* is the process of making a significant charitable gift during a donor's life or at death that is part of his or her financial or estate plan. Planned giving is also referred to as gift planning or legacy giving. In a nutshell, it is a donor's intention to contribute a major gift to an organization, beyond their lifetime. So, unlike an annual gift (an outright gift made for current use), a planned gift is for the future. Essentially, donors make arrangements for planned gifts in the present but they are actually doled out at a later date. Additionally, the major gifts contributed by a donor can be made as a part of their financial or estate plans.

Even if donors contribute on a recurring basis, planned giving enables them to contribute gifts that they wouldn't ordinarily be able to make. The gifts donated end up being larger and aren't dependent on one's regular income. That's why most planned gifts contributed by donors take the form of life insurance, equity, or real estate holdings (among others). Thus, even if a donor consistently contributed small gifts, their planned gift can be of a much higher value.

In order for an individual to leave behind a major gift, planned gifts can take many different forms. They can take the form of real estate, personal property, life insurance, or even cash. Other types of planned gifts provide a financial benefit on top of tax deductions for donors. Charitable remainder trusts provide an income stream for individuals, and at the death of the donor, the charity receives what is left in the trust. A charitable lead trust, on the other hand, produces a stream of funds for a charity, and at the death of the donor, the donor's heirs receive what remains in the trust. However, the majority of donors seem to gravitate towards 3 primary planned giving options:

## 1. BEQUEST

A gift (typically cash; personal property; real estate; stocks; or bonds) left behind in a will for a group, individual, or organization. There are four types of charitable bequests:

- **General Bequests:** gifts of property taken from the assets of an estate.

- **Demonstrative Bequests:** gifts that come from a source, such as a bank account.
- **Specific Bequests:** gifts of personal property such as cash, jewelry, or other tangible assets.
- **Residuary Gifts:** gifts that come from the remainder of any debts or expenses that have been paid along with other bequests that have been made.

## 2. ANNUITY

A fixed sum of money paid to an organization each year. So, this typically takes the form of a simple contract between a donor and a charity. Also known as a charitable gift annuity, a donor transfers cash, security, or assets to a cause in exchange for a partial tax deduction. They can also receive a lifetime stream of annual income from the charity itself.

## 3. TRUST

A legal entity whereby an individual holds or invests property as its titular owner. This can be for one or more beneficiaries. Additionally, there are two types of charitable trusts:

- **Charitable Remainder Trust:** a tax-exempt trust created to reduce an individual's taxable income by dispersing their earnings to the beneficiaries of the trust over time. The remainder of the trust goes to the organization outlined in the trust.
- **Charitable Lead Trust:** this is the inverse of a charitable remainder trust. The trust provides financial support to multiple causes over a specified period of time. The remainder of the trust then goes to the other beneficiaries (family members, friends, etc.)

Above all, planned giving preserves a donor's legacy. Donors first begin thinking about planned giving when they are nearing retirement age. So, donors may give to organizations that act in accordance with their personal values and beliefs. As a result, their planned gift symbolizes the relationship they've cultivated with the cause they've given to. If anything, they want their contribution to help secure the future of the organization. It also represents their commitment to positively impacting communities in actionable ways.

If you have been considering a planned gift to secure your legacy, please consult with your financial planner/advisor for assistance in carrying out your directives. If you have already created a planned gift to benefit Schmitt Woodland Hills, please contact Bill Bartlett the Development Director at 608-647-8931. We would like to acknowledge your gift in accordance with your wishes during your lifetime.



# SCHMITT WOODLAND HILLS

1400 W. Seminary Street Richland Center, WI 53581  
(608) 647-8931 [www.schmittwoodlandhills.com](http://www.schmittwoodlandhills.com)

NON-PROFIT ORGANIZATION  
U.S. POSTAGE  
**PAID**  
Permit No. 14  
Richland Center  
WI 53581

*ADDRESS CHANGE REQUESTED*

First Name Last Name  
Address  
Address 2  
City, State Zip

## WESTVIEW PROJECT

\$50.00  \$100.00  \$250.00  \$500.00  Other \$ \_\_\_\_\_

I would like to donate to the:  General Westview Project

Door Covering Project  Security Fencing

Shower Project  Kitchen Update  Memory Care Wing

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

Credit Card No. \_\_\_\_\_

Exp. Date \_\_\_\_\_ Sec. No. \_\_\_\_\_

(All above info required for credit card donations)

My Check is enclosed. (Make checks payable to Schmitt Woodland Hills)

Please mail to: 1400 West Seminary Street, Richland Center, WI 53581



*Thank you  
for your help!*

