

The Juliet Anderson Rosch Society

recognizes our donors who have given planned gifts that, when realized, will help to continue our mission of touching lives through faith and caring.

The Rosch Society recognizes those individuals who give gifts without ever experiencing the joy of seeing the impact their gifts will have on those we serve at LSS. Members of the Rosch Society play a key role in the fiscal stability of LSS and its ability to plan. Knowing that resources will be available in the future makes it possible for LSS to move forward today.

The Rosch Society was named after Juliet Anderson Rosch, a member of our LSS Family and a strong supporter of Lutheran Social Services. She served as an example to all of us on how to live life. She saw herself as an "accidental philanthropist," never quite able to understand why she had been given so much, but blessed because she passed her gifts on to many.

Think about the legacy that you want to leave behind. A planned gift is a selfless gift that makes life better for those who come after you.



Lutheran Social Services Foundation

To join or learn more about the Rosch Society and to leave your legacy, please call Gwen Axelson at (716) 665-8137 or e-mail her at: [gaxelson@lutheran-jamestown.org](mailto:gaxelson@lutheran-jamestown.org)

Touching Lives Through  
Faith and Caring

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Lutheran Social Services

**Juliet Anderson  
Rosch Society**



*In Recognition  
of our generous  
planned giving donors*

## Planning Information

Estate planning is the process of deciding how to best transfer your assets during your lifetime, as well as at death. If you're interested in furthering the mission of Lutheran Social Services while reducing taxes and possibly increasing your income, you may want to consider a planned gift. There are several popular planned giving options that ensure you a variety of tax and other benefits. The charitable gift annuity provides annual payments to you, so it is known as the gift that "keeps on giving".

The gifts may be unrestricted, giving the LSS Foundation the most flexibility to use where most needed; or gifts may be designated to any one of our programs such as the Lutheran Home and Rehabilitation Center, Hultquist Place, Lutheran Senior Housing, GA Family Services, Grace Community Services, and the RSVP/Foster Grandparent Programs.

- Bequests
- Charitable Gift Annuities
- IRAs and Retirement Plan Assets
- Life Insurance
- Charitable Remainder Trusts
- Charitable Lead Trusts

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## LANGUAGE FOR WILLS

One of the easiest ways to support Lutheran Social Services is through your will. The following language may be used when making a bequest. "I give, devise, and bequeath to Lutheran Social Services of Upstate New York, a nonprofit corporation located in Jamestown, New York, (specific amount, percentage or residual of the estate or description of property) for use in (state the purpose for which you wish your bequests to be used or indicate 'general purposes')."

Increasing private gift support is critical to the mission of Lutheran Social Services. To this end, the LSS Foundation was established in 1996 to enhance the programs and services of Lutheran Social Services of Upstate New York. Through planned gifts, memorials, and honorariums, the LSS Foundation has been able to support projects within all divisions of LSS and provides approximately \$500,000 yearly to meet the uncompensated cost of providing care and services to those in need from our community.

## The Mission of Lutheran Social Services

Lutheran Social Services, a Christian organization, is a comprehensive continuum of community, residential and home-based supportive services that helps people gain or retain independence.



Members of the Juliet Anderson Rosch Society gather for a brunch held in their honor (5/08).

## Join the Rosch Society

BECOMING A MEMBER of the Rosch Society is simple. Just notify us in writing that Lutheran Social Services is part of your estate plans—through your will, trust, insurance policy, retirement plan, annuity or any other method—and you are automatically a member. Disclosure of the specifics of your plan is greatly appreciated but not required. All communication is completely confidential.

## Benefits

As a member of the Rosch Society, the most important benefit you receive is the satisfaction of making a lasting contribution to Lutheran Social Services. In addition, you will receive the following benefits:

- Invitation to the annual recognition event honoring the Rosch Society members
- Recognition in select LSS publications and on the LSS web site. (As always, we honor requests for anonymity).