

Frequently Asked Questions

When I make a gift to Living Well Foundation, what options do I have to direct my contribution?

Contributions to the Foundation can be designated for the Community and within that Community, to a category listed below:

- Independent Living Entrance Fee Residents.
- Independent Living Renter Residents.
- Healthcare Residents.
- Unrestricted for Residents of the specific Community.
- Unrestricted for Residents of any Community.

Who oversees day-to-day operations of the Foundation? The Living Well Foundation is governed by a board of directors, which includes the Director of Philanthropy for Senior Living Communities.

What types of program expenses can be paid by the Foundation? The two supported programs are financial support for a Resident's Community Housing and/or Healthcare.

Can a contribution be given to the Living Well Foundation in Honor or Memory of someone? Absolutely! Contact us for more information.

Will the Foundation hold trusts? The Foundation will not hold trusts or other types of assets that require active or outside management.



Living Well Foundation
3530 Toringdon Way, Suite 204
Charlotte, NC 28277

Call us at:
(704) 815-7370

Contact us by email at:
info@Living-Well-Foundation.com

Visit our website at:
Living-Well-Foundation.com

EIN: 27-5317208

Attention Florida, Georgia and North Carolina Residents

A copy of the official registration and financial information may be obtained from the foundation website or the division of consumer services by calling within the state. Registration does not imply endorsement, approval, or recommendation by the state.

Florida - (800) 435-7352 or (800) 488-2221
Georgia - (478) 207-2440
North Carolina - (919) 807-2214



Extend Your Legacy
by Giving Today



The **Living Well Foundation** relies on the philanthropic generosity of Residents, family members, friends, and other Community partners to assist Residents in the Community when financial hardships surprise them.

Extend Your Legacy By Giving Today

WHY GIVE?

As one recipient of a foundation grant put it, her community was not just her home, it was her family. Your tax-deductible gift to the Living Well Foundation helps ensure that these family members don't have to leave the community due to a sudden financial burden.

GIVING NOW

Checks can be made payable to "Living Well Foundation" and be mailed to the address on the back of this brochure. You can also give online at Living-Well-Foundation.com.

If you have questions about another method of giving, please email for information or call the phone number listed on the back of this brochure.

You may wish to consult with your tax advisor, accountant, attorney and/or financial planner to explore the various ways to contribute.



“When I first [shared the news] of my leaving The Lakes because of insufficient funds, I never dreamed of the Christmas present that would soon be mine via the foundation!”

A recipient of a grant from the Foundation

Learn More

As a 501(c)(3) public charity, each contribution is 100% tax-deductible from federal income taxes and most state income taxes (we encourage you to seek tax advice from your advisor to determine whether contributions are deductible from state income taxes).

For more information, visit our website or call (704) 815-7370.

Gifts or contributions may be in the form of:

- Cash
- Securities (stocks, bonds, etc.)
- Bequests/Wills
- Contribution from an IRA
- Charitable Remainder Trusts
- Assets Economically Converted to Cash
- Life Insurance Policies
- Gift Annuities

Consider including the Foundation in your estate planning. Contact us to learn more about how your estate gift can make a lasting impact on others who are enjoying all that their community has to offer.