



*The Legacy Society*

*for the*

*Cave Hill Heritage*

*Foundation*

*The Legacy Society for the Cave Hill Heritage  
Foundation*

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*What you leave behind is not what  
is engraved in stone monuments,  
but what is woven into the lives of  
others.*

*- Pericles*

# *The Legacy Society for the Cave Hill Heritage Foundation*

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- ✦ What is the Cave Hill Heritage Foundation?
- ✦ How does the Legacy Society affect the future of the Cave Hill Heritage Foundation?
- ✦ How can I become a member of the Legacy Society?

# *The Legacy Society for the Cave Hill Heritage Foundation*

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## ✦ What is the Cave Hill Heritage Foundation?

- ✦ 501 (c)3 public charity
- ✦ Mission: To preserve the past for the future
- ✦ Focus areas:
  - **Restoration**...of historic structures, monuments, and grave markers
  - **Preservation**...of the arboretum setting
  - **Educational development**...of the community through the relay of historical information and the contributions of our residents to the region.

# *The Legacy Society for the Cave Hill Heritage Foundation*

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- ✦ **Restoration** of historic structures, monuments, and grave markers



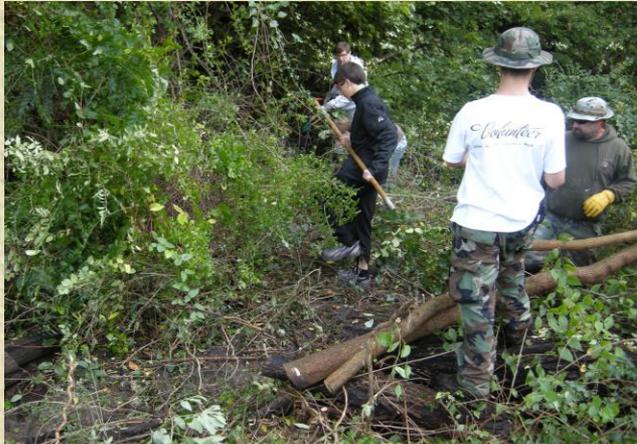
**Before & After**

**Caldwell Sisters Monument**

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## ✦ Preservation of the arboretum setting



Continual tree  
planting projects

&

Service projects



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✦ **Educational development** of the community through the relay of historical information and the contribution of our residents to the region.



Tours  
&  
Events

# *The Legacy Society for the Cave Hill Heritage Foundation*

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- ✦ The Cave Hill Heritage Foundation is governed by a Board of Directors associated with Cave Hill Cemetery
- ✦ We are guided by a stringent Code of Ethics, foster open communication with donors, and are committed to donor sensitivity.

# *The Legacy Society for the Cave Hill Heritage Foundation*

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## ✦ Cave Hill Heritage Foundation

### Demographics:

- ✦ 67% of funding comes from annual or 1<sup>st</sup> time mail-in donations
- ✦ 18% of donors live outside the region
- ✦ Current future expectancies exceed \$500,000.00
- ✦ Yearly donations range from \$35,000-50,000.00 per year

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✦ How does the Legacy Society affect the future of Cave Hill Cemetery?

✦ Your support will allow us to:

- Enhance the lives of school children and those in the community as they see the work of artisans from over a century ago.
- Replenish trees that die each year due to old age or disease-related issues.
- Get “back to normal” should natural disaster befall the area.

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✦ How can I become a member of the Legacy Society?

- ✦ Simply indicate that support our mission by naming the Cave Hill Heritage Foundation in your Will.
- ✦ We are not required to know the exact amount or residue of your estate.

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✦ You can also:

- ✦ Donate Appreciated Securities
- ✦ Donate Life Insurance or Retirement fund proceeds
- ✦ Establish a Life Income Fund
- ✦ Establish a Donor Advised Fund
- ✦ Donate Real Property
- ✦ Donate Cemetery Lots

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## ✦ Appreciated Securities

- ✦ Contact your broker to donate appreciated securities.
- ✦ The fair market value of the securities is considered eligible for income tax deduction.

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## ✦ Donate Life Insurance or Retirement Fund Proceeds

- ✦ Check with your fund administrator, and have them list the Cave Hill Heritage Foundation as your beneficiary.

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## ✦ Life Income Fund

- ✦ You transfer funds to a Trustee, i.e. Community Foundation of Louisville, UBS
- ✦ Trustee invests funds in a designated set of stocks, bonds, mutual funds, etc.
- ✦ You or a beneficiary receives a defined monthly benefit from the investment.
- ✦ The Trustee is responsible for meeting the threshold monthly benefit, taking full risk.
- ✦ Upon your passing, the balance of funds that remain, pending principal reduction if included in the agreement, is paid to the Cave Hill Heritage Foundation.

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## ✦ Donor Advised Fund

- ✦ Donor provides funds to a Trustee, i.e. Community Foundation of Louisville, UBS
- ✦ Donor sets parameters for funding use and the amount provided to the Cave Hill Heritage Foundation.
- ✦ You can elect family members to monitor the actions of your donor advised fund, providing a control mechanism.

# *The Legacy Society for the Cave Hill Heritage Foundation*

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## ✦ Donate Real Property

- ✦ Families can donate property to the REAL Foundation (associated with the Community Foundation of Louisville)
- ✦ The REAL Foundation will review the information, act as an agent to sell the property, and transfer the net proceeds to the Cave Hill Heritage Foundation.

# *The Legacy Society for the Cave Hill Heritage Foundation*

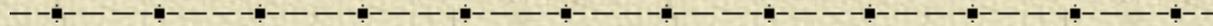
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## ✦ Donate Cemetery Lots

- ✦ Donate unused grave spaces on your family lot to the Cave Hill Heritage Foundation, pending approval of cemetery management.
- ✦ The current value of the lot is assessed, and assigned as a tax-deductible donation to the Cave Hill Heritage Foundation.
- ✦ The Cave Hill Heritage Foundation sells the interment rights, and collects the net proceeds.



*Cave Hill Heritage Foundation*



*701 Baxter Avenue*

*Louisville, KY 40204*

*[www.cavehillheritagefoundation.org](http://www.cavehillheritagefoundation.org)*

