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If the **Mission Advancement** department may be of service, please contact us.

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Mission Advancement UPDATE

SUMMER 2023

DEAR DONORS

Welcome to the summer issue of our donor newsletter. I'm excited to share Nebraska Brother Jeff Walz, University of Louisville women's basketball head coach, has signed on as keynote for our Carefree Living Luncheon - Louisville. Continuing reading for more information on this fun opportunity along with a calendar of our 2023 events.



I am very excited to have Travis on our team working alongside me, Vice President of Mission Advancement Meg Williams and Donor Relations Manager Brenda Travis.



Please visit
masonichomesky.com/giving
for more information on our giving programs and fundraising events.

You will also read about a generous donation to the Sam Swope Care Center furniture project putting us at 85% of our fundraising goal. It is a very exciting time for Masonic, and your support makes all the difference.

I want to take this opportunity to introduce you to the newest member of my team, Brother Travis Short, vice president of fraternal relations. Travis will be responsible for volunteer recruitment, donor cultivation and will serve as liaison to Masonic lodges and affiliated Masonic bodies.

He will oversee the Ambassador program working with State Ambassador Ray Wolford, help coordinate Great Day of Service, and manage fundraising efforts for Badge of a Mason and Friends of Masonic Homes campaigns.

Travis is a Master Mason (183/437/566), a 32° Scottish Rite Mason at the Valley of Lexington, the Knight Warden of the Knights of St. Andrews and a member of Oleika Shrine Temple. Prior to joining Masonic, he was a facilities maintenance technician with the University of Kentucky Medical Center.

Travis and his wife Leslie reside in Paint Lick, KY and own Berea Massage Studio.

COMMUNITY FEATURE

Sam Swope Care Center

Opened in 2010, the Sam Swope Care Center at Masonic Home Louisville, spans 196,000 sq. ft., was created to broaden our continuum of care. Designed with ease and convenience in mind, the Care Center combines skilled nursing, memory and palliative care, rehabilitation services and dialysis — all in one community. Since its inception, it has served more than 10,000 residents and guests.

The Care Center was named after local businessman and entrepreneur, Sam Swope, who made Masonic history by giving the largest individual gift ever received.



JULY

- Masonic Alumni Reunion
The Olmsted – July 9
- Masonicare Car Show
The Olmsted Lot – July 15

AUGUST

- Carefree Living Luncheon - Louisville
The Olmsted – August 24

SEPTEMBER

- Bowling Green Dinner and Auction
The Club at Olde Stone – September 10
- Annual Jim Johnson Charity Golf Classic
The Club at Olde Stone – September 11

- The Olmsted Society Dinner
Meadow Active Lifestyle Community –
September 21

OCTOBER

- Masonic Masquerade Gala
The Olmsted – October 20



**MARK
YOUR
CALENDAR**



In 2021, Masonic launched the Sam Swope Care Center furniture project with a goal of raising \$665,500, with a 25% endowment component, to refurbish the private guest rooms and communal dining areas. Thanks to generous donor support, the project has reached 85% of its goal and we anticipate completing the project this year.

Help us reach our goal by considering a gift. Contact giving@masonicky.com or call 502.259.9627.

FEATURED EVENT

Jeff Walz to Speak at Carefree Living Luncheon - Louisville

Masonic is excited to announce Brother Jeff Walz, University of Louisville women’s basketball head coach will be the keynote speaker at its Carefree Living Luncheon - Louisville on Thursday, Aug. 24 at noon at The Olmsted.

Carefree Living was created to educate the community about Masonic’s services and raise funds to supplement the \$4.1 million in Charitable Care that we provide each year to residents who meet certain requirements.



About the speaker:
Lightning speed. That’s the only rate at which Jeff Walz operates. It’s also the pace at which University of Louisville women’s basketball burst into the national spotlight under his tutelage as one of the most competitive and successful

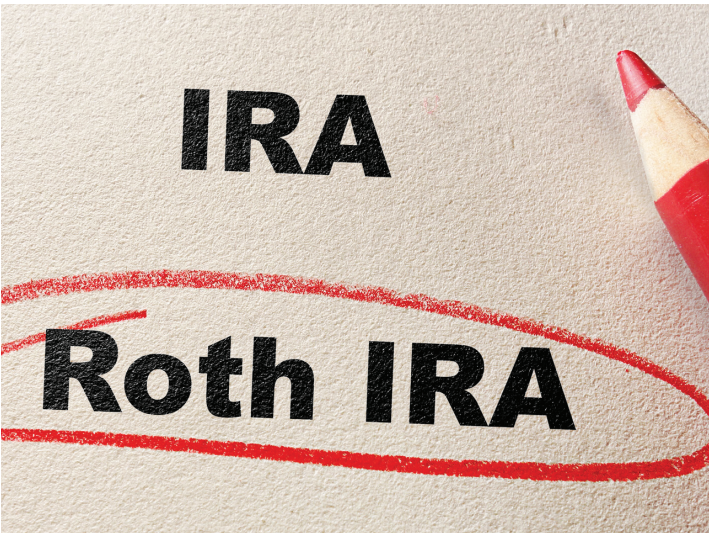
programs. Walz and the Cardinals boast quite an astounding resumé that includes 12 trips to the NCAA Sweet 16, eight trips to the Elite Eight, four trips to the final four and two trips to the national title game.

Walz is the all-time winningest coach in program history with a record of 441-124 and averages 27.6 victories per season. His inspirational and motivating talk will leave attendees pumped up and ready to win their own championship.

For more information, contact Vice President of Mission Advancement Meg Williams at 502.753.8843 or mwilliams@masonicky.com.

GIVING OPTIONS

Consider Converting your IRA to a ROTH IRA



Did you know you can convert your traditional individual retirement account or “pretax” IRA into an “after tax” or ROTH IRA? This has some large advantages including never being forced to pay taxes on the investment again and not being forced to take your money out through required minimum distributions or RMDs. Required Minimum Distributions (RMDs) are increasing amounts beginning at age 72 whereby the IRS requires you to make a distribution from your 401K / Traditional IRA or face a 50% penalty.



The largest disadvantage to a conversion is the taxes you may owe now. If you’re a high-income earner, you may not want to convert your traditional IRA just yet. That would force you to owe taxes at a higher tax bracket.

Typically, the optimal time to convert an IRA is usually when two conditions happen. The first one is when the market drops between 15-30%. The market falling as much as it did in 2022 means that you can convert your traditional IRA to a ROTH IRA with a 25% savings on what you’d typically owe in taxes. The second condition is that you find yourself in a lower tax bracket. Sometimes this happens naturally, like when you might be early in retirement or transitioning between jobs. Historically, taxes are far less today than they were ten years ago, making it still a bargain to convert at least a portion of your IRA to a ROTH IRA. If tax legislation is passed by congress, to increase rates, it may make sense to convert prior to any increase going into effect.

Conversion happens on a case-by-case basis and it’s recommended to consult with a CPA or tax attorney to see if it makes sense in your specific situation.

Consult your tax advisor to determine the specific benefits available to you.

For more information on ways to donate, email us at giving@masonicky.com.

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