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

- Pericles
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?
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

🌟 Restoration of historic structures, monuments, and grave markers

Before & After

Caldwell Sisters Monument
The Legacy Society for the Cave Hill Heritage Foundation

🌟 Preservation of the arboretum setting

Continual tree planting projects & Service projects
The Legacy Society for the Cave Hill Heritage Foundation

🌟 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

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.
Cave Hill Heritage Foundation

Demographics:

- 67% of funding comes from annual or 1st 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
The Legacy Society for the Cave Hill Heritage Foundation

🌟 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.
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.
The Legacy Society for the Cave Hill Heritage Foundation

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
Appreciated Securities

- Contact your broker to donate appreciated securities.
- The fair market value of the securities is considered eligible for income tax deduction.
The Legacy Society for the Cave Hill Heritage Foundation

Donate Life Insurance or Retirement Fund Proceeds

- Check with your fund administrator, and have them list the Cave Hill Heritage Foundation as your beneficiary.
The Legacy Society for the Cave Hill Heritage Foundation

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.
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.
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.
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.