

BOONE COUNTY SENIOR SERVICES FOUNDATION, INC.

LEGACY

Fall 2024

Boone Area Transit “BATS” is an easy decision for this Boone County Family

Before using BATS in 2001, Dick and Edla Hovermale were driving their daughter Melinda, who is in a wheelchair, 17 miles, four times per day to her special program. It was an easy decision for the family to begin using BATS because it offered bigger buses, wheelchair accessibility and a professional, and friendly driving staff. Edla stated “It is the best experience we have had, and we just love all of the drivers. They are always friendly, caring, on time, and the vans and buses are clean and well maintained. We have used many drivers over the years and we consider them all family. I just can’t say enough good things about the program. Some of the early drivers that left an impact on us include Gene Keck (who is still on staff today), Paul Reagan, Gary Lanpher and Ron Shockley to name a few. Melinda just loves



Melinda is pictured in her BATS costume with Directors of Transportation Susan Hodgdon and Stacie McQuern.


them all. When she turned 40, a group of drivers came to our home in one of the BATS buses to sing her happy birthday and what a special surprise that was for her. Melinda also loves so many of the newer drivers including Bill and Linda Fogle. I enjoy sharing with others about BATS and the many programs BCSSI offers including the medical equipment and the large variety of

activities. We have lived all over the country and we moved to Boone county so Melinda could specifically utilize the special programs in this county. We just love the community and how quaint and friendly everyone is to our family. I would encourage others to use BCSSI and BATS.”

Melinda recently surprised our staff with a special visit on Halloween. She was dressed as a BATS van which included the BATS logo, headlights, windows and even a wheelchair ramp!



Thank you to the Hovermale family for using our services and trusting our staff to transport Melinda. Thank you as well to our donors who make it possible for BCSSI to offer a quality transportation service at an affordable price to the public. We welcome donations of any amount to the Boone County Senior Services Foundation whose mission it to grow a fund so BCSSI can continue to serve older adults and those that need transportation services of all ages well into the future.



If you would like to learn more about leaving a gift to the Foundation and making a difference in the future of older adults in Boone County, we welcome an opportunity to meet with you.

This Legacy publication is from the Boone County Senior Services Foundation, Inc. (BCSSF) whose mission is to grow a fund so Boone County Senior Services, Inc. (BCSSI) can continue serving older adults in Boone County.

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One way to help Boone County seniors at this critical time is through gifting retirement assets.

Here is how it works: funds held in your 401(k) or 403(b) plan will be fully taxed if withdrawn for your use, or at your death. You are also required to take an annual amount from your retirement assets each year, once you are 73, called a Required Minimum Distribution (RMD).

You can, however, make a gift of retirement assets directly to the Boone County Senior Services Foundation, Inc. (BCSSF) (or multiple charities) and avoid federal tax liability. If you're 70 1/2 or older this year, you can give any amount, up to a total of \$100,000, directly from your retirement plan assets to charity (but not to a donor-advised fund) in what's known as a Charitable IRA Rollover or Charitable Qualified Distribution. Your plan administrator or

financial advisor will know how to make this happen. It is simple and easy.

This distribution counts toward your Required Minimum Distribution but isn't included in your adjusted gross income. The transfer must be made directly from your IRA to the charity to count as a Qualified Charitable Distribution; you cannot withdraw the money first and write a check later. Ask your financial advisor or 401(k)/403(b) plan how they handle these transactions and confirmation you will need at tax time.

BCSSF can also be named as a beneficiary or contingent beneficiary on retirement or investment accounts. Upon your death, the assets named in the beneficiary declaration will flow directly to BCSSF to continue your legacy of caring for those in need in Boone County. And, this gift will bypass your taxable estate, potentially saving more for heirs.



This year the BCSSF Foundation offered several seminars on Estate Planning as well as a workshop about security and online safety. Whether you are looking for advice for organizing your estate plan, or protecting your identity and finances, the Foundation's seminars are a safe place to begin those first steps. Thank you to Lee Cannon, Edward Jones Advisor and Roger

Burrus, Attorney, for speaking during a Zionsville Lunch and Learn about Estate Planning. Thank you, as well, to long-time supporter Perry Hammock, President of Vitruvian, LLC, for presenting his Security and Online Safety Workshop this fall.



Sharon (left) is pictured with Erin Herr who serves as the VP of the Foundation.

From Our Foundation Board President:

"Your financial gift to the BCSSF Foundation is an investment in the future of BCSSF. We are also the safety net when a funding emergency happens at BCSSF and those are happening more often as expenses continue to rise for programming and transportation. There is still time to send in your donation before the end of this year. All donations will be recognized in our annual report. We welcome donations of all sizes and you can even give a gift through an IRA distribution! Thanks for your consideration!" ~Sharon Walker, BCSSF President

Boone County Senior Services Foundation Donation & Memorial Form

Please accept my gift in the amount of: \$ _____

My form of payment is: _____ enclosed check made payable to BCSSF Foundation

_____ credit card: _____ Visa _____ MC _____ Discover

Card #: _____ Exp. Date: _____

Your Signature: _____

My gift is in Memory or Honor (circle one) of: _____

Please send notification card to: _____

Street Address: _____ City, State, Zip: _____

Please mail this form & payment to:

Boone County Senior Services Foundation, Inc.: 515 CrownPointe Dr., Lebanon, IN 46052

Thank you to our Legacy Donors who are honored on our Legacy Tree:

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