



## Ask Our Amy

Vice President of Development and Community Life Amy Capofreddi answers your questions about planned/estate giving. Submit your questions to [acapofreddi@nedeaconess.org](mailto:acapofreddi@nedeaconess.org). Or call 978.402.8273.

### What is the benefit of rolling over money from an IRA to a Charitable Gift Annuity (CGA)?

Tax laws changed in 2023 to allow individuals age 70½ or older to use a

Qualified Charitable Distribution (QCD) to create a Charitable Gift Annuity with up to \$53,000 from an IRA. A CGA generates monthly income for the donor at a fixed rate of 6.3 to 10.1%, depending on your age.\* The QCD does not count as taxable income, but it does count toward the annual Required Minimum Distribution (RMD) for individuals 73 and over. The designated charity receives any remaining funds after the donor's lifetime.

CGAs to benefit New England Deaconess Association can be set up through entities such as the United Methodist Foundation or Fidelity. I'm happy to meet with anyone to explore this mutually beneficial option further.

\* Suggested Maximum Rates for Single Life Gift Annuity effective January 1, 2024, reconfirmed October 24, 2024, American Council on Gift Annuities

Note: This column is for informational purposes. We strongly recommend you consult your financial/tax advisor before making any planned gift.

## 1889 Society Dashboard

April 1, 2022—November 30, 2024

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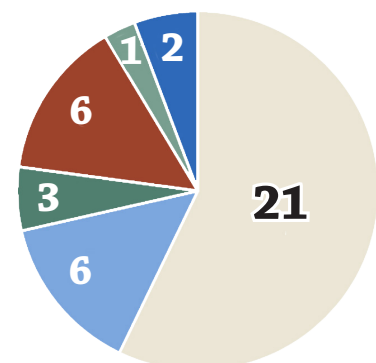
Members

**\$4,559,424**

Value of Received Gifts

**\$4,093,410**

Estimated Value of  
Committed Planned Gifts



■ Donation of Entrance Fee Deposit  
■ Bequest  
■ Charitable Gift Annuity  
■ IRA / Annuity Beneficiary  
■ Charitable Remainder Trust  
■ Other



# THE 1889 SOCIETY

A MEMBERSHIP OF DONORS *caring about tomorrow*

KEEPING DONORS AND POTENTIAL DONORS INFORMED

JANUARY 2025; VOL. VIII

## Serving Something Bigger

A theme of service to the community united the honored guests and surprise performers at the 3rd Annual Louise's Table in November at the Concord Country Club. About 50 people attended the multicourse dinner recognizing members of Newbury Court's 1889 Society.

Attendees were treated to a performance of Colonial-era music by a fife and drum corps. Carl Sweeney, Captain of the Concord Minutemen, spoke about the civilians who stepped up to fight for the freedom that defines our country today. This coming April marks the 250th anniversary of the "shot heard 'round the world" from Concord's North Bridge, starting the Revolutionary War.

CEO Chris Sintros noted that Louise's Table coincides with the November 1, 1889, founding of the New England Deaconess Association. "Deaconesses were unassuming young women," Chris explained, citing the Boston Globe, "helping the poor, the sick, the dying. It was understood that the work of the deaconesses was a labor of love, that there was no salary, only assured support."

Chris concluded, "The Deaconesses and the Minutemen didn't go into their roles for themselves, but for something bigger." The same could be said of the members of The 1889 Society. Newbury Court is blessed by their giving to ensure the future of this community.



Fife and drum corps



Louise's Table dinner attendees



## A Note

from Christopher Sintros,  
President and CEO, Deaconess Abundant Life  
Communities

and Sally Nash, Chair,  
1889 Society Committee



Just as a single donation led to the founding of the Deaconesses in 1889, this fall philanthropy transformed our campus for the better. The new Buttercup Boardwalk along the Sudbury River is a tangible example of the “power of visionary philanthropy” at Newbury Court.

More than 80 donors gave over \$775,000 to create the 0.4-mile accessible trail. The largest gift was a \$500,000 bequest from Natalie Friberg. Recognizing Natalie’s love of nature and animals made the allocation to the trail project a perfect fit.

The Haney-Wiltsee family made a wonderful gift in memory of Jean and George Wiltsee, donating \$100,000 from Jean’s estate. Jean and George talked about this land for years, hoping that one day trails could be built for the entire community.



As Trails Committee Co-Chair Joanne Gibson said at the opening ceremony, the Buttercup Boardwalk “is a game changer. We can still view the Sudbury River and Fairhaven Hill, visit our lovely gardens, and now regardless of mobility we can all experience being in our wetlands and woods, which have been so near and yet so far.”

Heartfelt thanks to all the trail donors! Because of your philanthropy, in the words of one resident, “Now more of us will have the restorative, deeply inspirational experience of being able to be outside, off pavement, under sky.”



## A Legacy of Paying It Forward



We celebrate the life of Libby Wilson, an enthusiastic member of The 1889 Committee who is no longer with us. When describing why she became a member of the committee and the society, Libby summed it up perfectly and shared the message with our entire community.

*“I believe thoroughly in the concept of paying things forward,”* she said. *“I think about everything that people did to make Newbury Court what it is today. Now it’s our turn.”*

Libby donated part of her Entrance Fee Refund as her planned gift, calling it a *“no brainer.”* She said, *“It’s so easy to just give some of that money back.”*

She often told Chris Sintros, referring to Newbury Court, *“I’ve loved every day that I’ve been here.”* We were all blessed to have Libby as a resident, volunteer, and friend.

## The 1889 Society Committee Members

**Sally Nash, Chair**  
Newbury Court Resident

**Jake Brown**  
Newbury Court Resident

**Amy Capofreddi**  
VP Development and Community Life

**Patty Fraser**  
Newbury Court Resident

**Bo Grove**  
Newbury Court Resident

**Rev. John Lombard**  
NEDA Board Member

**Christopher Sintros**  
President and CEO, NEDA

**Lynn Stroud**  
Newbury Court Resident

## The 1889 Society Members

Shirley Andrews • Janet Bailey  
Mary Jane Baylies • Larry Bergstresser  
Jane Beswick • Jake and Barbara\* Brown  
Winifred B. Bush\* • Judge Levin Campbell  
Pat Carney • Barbara Clemens  
Brooks\* and Mary Lu Cowgill • Rev. John Dusenbury\*  
Katharine Esty • Patty Fraser • Natalie Friberg\*  
Chuck & Joanne Gibson • Katharine Esty  
• Don Goldstein • Bo Grove • Peter Gunness\*  
• Sarah Hindle • Janet Johnson\*  
• Betsy Julier • John Leigh  
• Mark Hopkins/Margie Yamamoto  
• Armand and Mary Malo • Joan McGowan  
• Pat McKenzie • Ruth Evelyn Miller\*  
• Martha Morrison\* • Sally Nash  
• Joan Pierce • Betty Schiller • Lynne Stinson  
• Bob and Lynn Stroud • Henry and Janet Valliant  
Alice Vannerson • Libby Wilson\*  
Jean Baird Haney Wiltsee\* and George Wiltsee\*

\*Deceased