

## The SullivanArc Foundation

was established to further the mission of SullivanArc, A chapter of NYSARC. The Foundation is helping SullivanArc continue to stand the test of time by supporting development of new and innovative programs while bridging the gap in its funding streams.

The objectives of growing the Foundation are to provide:

- *Supplemental funding for development of new and innovative programs*
- *On-going income for existing programs and special projects*
- *A long term, stable income stream to support the annual budget*
- *A financial hedge against inflation and other economic hard times*
- *Protection in case of emergencies*
- *Leverage for attracting other resources*

Just as SullivanArc transforms the lives of people with developmental disabilities and enables them to live as contributing, valued members of their community, growing the SullivanArc Foundation will enable SullivanArc to become more financially independent and ultimately better to fulfill its mission far into the future.

*Please Help Preserve and Protect  
SullivanArc's Future*



*You are cordially invited to join*

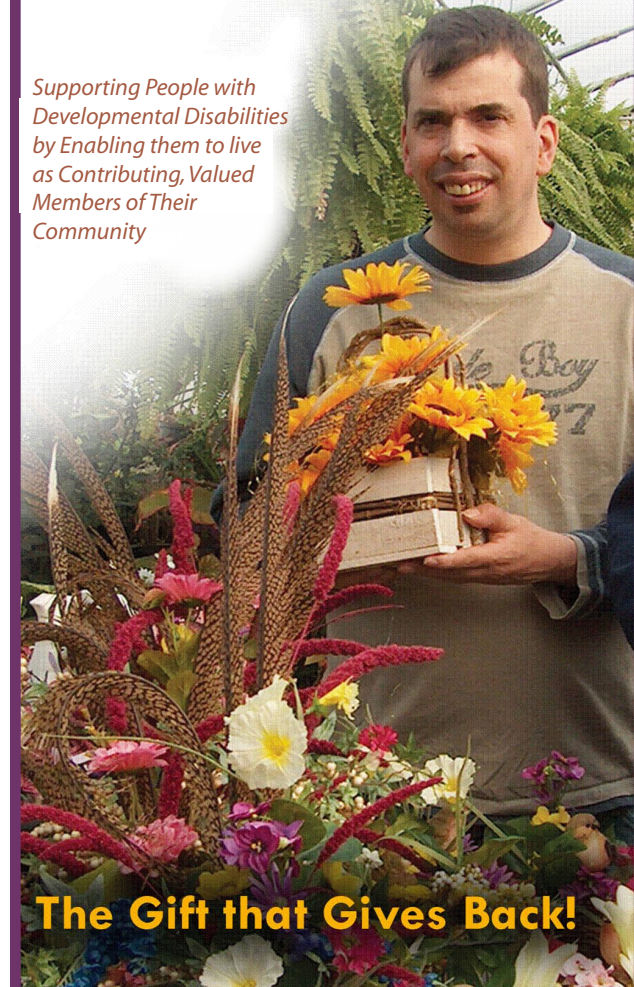
*The SullivanArc  
LEGACY SOCIETY,  
an association of individuals who  
demonstrated their generosity and  
commitment to SullivanArc by  
remembering the Foundation in  
their Estate Plans and Wills.*

SullivanArc Foundation  
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*You can plant the seed  
that will grow in the garden of  
tomorrow...*



*Supporting People with  
Developmental Disabilities  
by Enabling them to live  
as Contributing, Valued  
Members of Their  
Community*



**The Gift that Gives Back!**



*We make a living by what we get,  
but we make a life by what we give.*

*Winston Churchill*

## ***Gift Giving Options***

### ***Craft Your Legacy with a Cash Gift***

This is the easiest way to make a gift. Cash gifts are deductible up to 50% of adjusted gross income (AGI), with a five year carry over for any excess. Please remember, corporate matching gifts can substantially increase the gift we receive from you. Does your corporation have a matching gift program?

### ***Use Your Real Estate Creatively with a Property Gift***

Real estate is often an attractive asset to give, and it can be given in many different ways.

On property you have held for more than 12 months you can deduct the fair market value of the property up to 30% of AGI, with a five year carry over for any excess. If the property you own is un-mortgaged and has appreciated in value you can avoid capital gains tax. Additionally, you can gift your residence, vacation home, or farm and retain the right to live in and enjoy the property for your life – after which the property goes to the SullivanArc Foundation.

### ***Unlock the Value of Your Assets with a Securities Gift***

Marketable securities that have increased in value can be an attractive asset to give.

*Appreciated Securities.* When you give long-term (more than 12 months) appreciated stock outright to a charity organization such as the SullivanArc Foundation, you avoid capital gains tax. You can deduct the fair market value of the stock, up to 30% of AGI, with a five year carry over for any excess.

*Depreciated Securities.* When your stock has depreciated in value, you are usually better off to sell the stock, take the capital loss on your income tax return, and generate a charitable deduction by donating the cash proceeds to an organization such as the SullivanArc Foundation.

### ***Provide For Your Family with a Life Insurance Gift***

You can use your life insurance policy to make a gift through designating our organization as the beneficiary or make us the owner of the policy. As the donor, your estate will be entitled to an estate tax deduction if the insurance proceeds are paid to the organization as the beneficiary. Or, you can receive a Federal income tax deduction for the gift of the policy. Also, if you continue to pay premiums on a policy we own, you can deduct the premium payments.

### ***Achieve Philanthropic Goals With a Gift That Provides You Income***

Life income gifts permit you to collect an income as a result of making a charitable gift. Depending on the sort of plan you select, the income can be fixed or variable, and it can be for you or other beneficiaries you elect.

In addition, to possibly increasing income, donor can fund the gift with long-term appreciated assets, and will reduce or avoid the capital gains tax on the appreciation. As well as, get a tax deduction and save income taxes now because of the gift.

The information contained here is not intended as legal advice.  
For legal advice, please contact an attorney.