

## A Gift that Offers Tax Benefits and Lifetime Payments

A Special Olympics charitable gift annuity allows you to receive regular, fixed payments from us when you make a meaningful gift to support our work. Sounds too good to be true? Well, it's true!

In return for your gift of cash or stock, Special Olympics will pay you a fixed amount for the rest of your life. The amount will never change. You may also be eligible for significant tax savings.

Whether you are already retired or are planning now for retirement, charitable gift annuities are a great planning tool worth considering. The minimum amount to establish a Special Olympics gift annuity is \$10,000 and you must be 65 or older to receive payments.

Call us now, toll-free (866) 690-3951 for a personalized illustration of the rate and benefits you would receive by establishing a charitable gift annuity.



## A Legacy of Inclusion: Gifts that Reflect Your Values

Throughout our lives, there are moments when we pause to reflect on what we have achieved and what we hope to accomplish. We consider how to write each chapter of our life story in a way that embodies our values in word and deed.

In this brochure we outline the most common ways you can show your support of Special Olympics with a meaningful future gift. Our staff is happy to talk with you about your unique circumstances, to answer any questions you might have, and to help ensure that the approach you take realizes your personal and family goals—while also remembering Special Olympics.

### Forever Grateful

We will be forever grateful for your support and we will never for one moment forget how much we are indebted to you and the commitment you have shown to helping people with intellectual disabilities.

### Good Stewards

We will continue to be good stewards of the funds you have entrusted to us—you deserve nothing less.

### Respectful

We will honor your wishes. If you wish to remain anonymous or if you wish to designate your donation for a particular initiative that is dear to your heart, your goals and objectives will always be paramount.



## A Gift in Your Will

Creating your plan is one way to create a secure future for you and your loved ones. You can rest easy knowing that your family will be well cared for and your property will pass to your intended beneficiaries.

In considering your plans for the future, you may not only be thinking about how to help your family, but also how you might benefit one or more charitable organizations. Many people choose to include a gift in their will to organizations and causes that are meaningful to them. You can include Special Olympics in your will or trust and ensure that your support will continue in perpetuity. A gift from your will or trust is a time-honored way of ensuring that your support of Special Olympics continues for generations to come.

These gifts:

- Require no immediate donation.
- Transfer to Special Olympics only after your lifetime.
- Maintain your ability to change your mind at any time.
- Are welcome in any amount.

### To make a gift to Special Olympics Arkansas we recommend the following language:

"I give, devise, and bequeath \_\_\_\_% of the rest, residue, and remainder of my estate (or sum of \$\_\_\_\_) to Special Olympics Arkansas – North Little Rock, AR, for its unrestricted use and purpose."

### To make a gift to the Special Olympics movement in the U.S. and around the world:

"I give, devise and bequeath \_\_\_\_percent of the rest, residue and remainder of my estate (or the sum of \$\_\_\_\_) to Special Olympics, Inc., Washington, DC, for its unrestricted use and purpose."

## Make A Gift by Signing Your Name

Many of us have sacrificed to accumulate retirement savings in expectation of a long and comfortable retirement. Those same frugal habits often result in not using all the money we've saved. Most retirement plans are subject to income and possibly estate tax when transferred to others. That's why, from a tax perspective, the best legacy gift to charity is often from a retirement plan.

If you designate Special Olympics as beneficiary of your retirement plan you can:

- Leave other, less heavily taxed assets to your family
- Change your beneficiaries at any time, retaining maximum flexibility
- Take action without the expense of an attorney. Simply request a change of beneficiary form from your plan provider and include Special Olympics as a full or partial beneficiary
- Because we are tax exempt, 100% of your gift will benefit Special Olympics and our athletes of the future
- When you establish a donor advised fund, consider naming Special Olympics the beneficiary of funds remaining after your lifetime

Please call us for instructions on how to make a gift by beneficiary designation.

**"I have been involved with Special Olympics for years and chose to make a bequest gift so that I can support these inspirational athletes beyond my time on this Earth." — Gary K**

## YES! I want to do more.

- I have included a gift to Special Olympics in my will.
- I intend to include Special Olympics in my will.
- I am considering including a gift to Special Olympics in my will.
- I would like to learn more about other smart ways to support Special Olympics.

Please have a staff member contact me:

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_

BestTime to Call \_\_\_\_\_

## Start the Conversation and Learn More.

Special Olympics Bequests & Estate Gift Center  
1133 19th Street, NW, Washington, DC 20036

Call us Toll Free: (866) 690-3951

Email us: [plannedgiving@specialolympics.org](mailto:plannedgiving@specialolympics.org)

Visit us on the Web: [www.SpecialOlympics.org/legacy](http://www.SpecialOlympics.org/legacy)



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