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A PLAN You Can Trust

Through the establishment of a Special Needs Trust, Quincy and Zelia Abbot are ensuring that their daughter Becky can always maintain her quality of life. Whether she needs a new stove or just wants to visit with her sisters, who now live in two different states and Italy, the funds will be there to enable her to buy or do those things as she has in the past. And by generously listing The Arc of the United States and The Arc of Connecticut as two of three residual beneficiaries of the trust they created for Becky, the Abbots are also helping to ensure that together we continue to make a difference in the lives of individuals with intellectual and developmental disabilities (I/DD).

When Becky was a year old, the Abbots realized that she was developing differently than other children her age. An acquaintance from their church helped them better understand by providing them with the book, "You and Your Retarded Child." Although the title

is outdated, it did shed light on what it means to be the parent of a child with I/DD and the challenges that lay ahead of them.

Over the years they encountered discrimination, but that didn't deter them. Mr. and Mrs. Abbot joined The Arc when Becky was two years old to seek the fellowship of other families in similar situations. At age eight, Becky no longer was excluded from school thanks to The Arc's battle to revise Connecticut's Special Education law and, in return, Quincy joined the board of his local chapter. At age 18, Becky received monthly SSI checks thanks to a lowering of the eligibility age fought for by The Arc. The advocacy efforts of the local and state chapters, and the national office, meant that Becky was able

to join her peers in grade school and benefit from SSI direct payments.

Quincy Abbot has been very actively involved with The Arc at every level. He has served as both a volunteer of several chapters. He feels that, as the parent of a child with I/DD, he has responsibilities that extend beyond his lifetime. That is why he supports the use of special needs trusts whenever possible.

If you would like to learn how you can leave a legacy for your family and The Arc through a trust, a will or by some other means, please contact Bob Bennett, Director of Major Gifts and Planned Giving at The Arc at 202.600.3495 or by email at bennett@thearc.org. ■



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AN EASY WAY TO **Create a Legacy**

Every day The Arc touches the lives of many people. For 65 years, The Arc has grown through the generosity of supporters like you, which permits us to continue our work today and into the future. If you are looking for a way to leave a lasting legacy, it's easier than you might think to make a significant impact through a gift to us.

While gifts of cash and checks are always appreciated, special gifts to The Arc can be made in other ways. And you can make a gift without affecting your current lifestyle by using your assets during your lifetime and leaving what remains to help further our mission.

For an even simpler way of giving, you could name The Arc as a “payable on death” beneficiary

of your savings or investment accounts. For instance, you could name The Arc as a beneficiary of the following assets:

- Retirement accounts such as IRA, 401(k) or 403(b)
- Life insurance policies
- Commercial annuities or investment accounts

When you name The Arc as a beneficiary on any of your accounts or assets, you can potentially reduce taxes for your family and your estate. You can also reduce your estate administration costs. Best of all, when you give a special gift to The Arc, your values, ideals, and your legacy continue into the future. Call 202.600.3495 or e-mail Bob Bennett at bennett@thearc.org for more ideas on ways to fund your legacy. ■

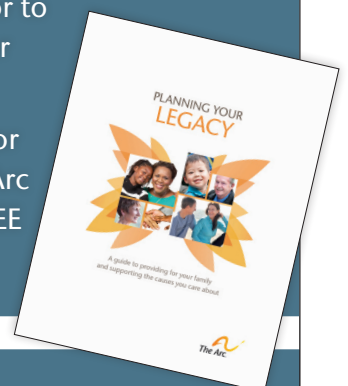
HAVE YOU EVER
**Wished you
could help?**

But thought you
couldn't afford to give?

FREE! Wills Planning Guide

Using the Guide to Planning Your Will & Trust, you can organize what you own and state who you intend to benefit. Once your guide is completed, we encourage you to visit with your advisor to finalize your plan.

Please call or email The Arc for your FREE copy.



LEARN MORE

Please contact us to learn more about the many ways to make your investments work for you and help The Arc. You can reach us at 202.600.3495 or by email at bennett@thearc.org.

A WAY TO Give and Receive

What is a charitable remainder unitrust?

1. You transfer cash or assets to fund a charitable remainder unitrust.
2. In the case of a trust funded with appreciated assets such as stocks and other retirement savings, the trust will then sell the assets tax free.
3. The trust is invested to pay income to you or any other trust beneficiaries you select based on a life, lives, a term of up to 20 years or a life plus a term of up to 20 years.
4. You receive an income tax deduction in the year you transfer assets to the trust.

5. The Arc benefits from what remains in the trust after all the payments have been made.
6. You may subdivide the remaining benefits for The Arc with a pre-determined portion or percentage going to your local or state chapter as well as The Arc of the United States (the national office).

Contact us to see how you could benefit and create a legacy to sustain our work. ■



Unitrust AND Sale of Stock

Did you know that... By giving your stock to fund a unitrust you can avoid capital gains tax because the trust will sell your stock tax free and then invest the proceeds to provide you with income for life. You will

receive a charitable income tax deduction in the year the trust is established and benefit from tax savings that could be spread out over a number of years. The Arc will benefit from the future remaining trust value. ■

Secure: Investing in the Future is a new publication that is intended to address two separate, but very important issues. First, security is important to all of us in a variety of different ways. On the other hand, as a leader in serving the needs of people with intellectual and developmental disabilities and their families, The Arc must also secure its financial future to assure that it will continue to be a voice for future generations. *Secure: Investing in the Future* seeks to address the financial concerns of the family, while looking at ways for our donors to ensure the future of The Arc.



*For people with intellectual
and developmental disabilities*

1825 K Street, NW, Suite 1200
Washington, D.C. 20006

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Secure: Investing in the Future...

plan for your future

secure the future for loved ones

support the work of The Arc