



Memorial and Special Occasion Gifts



For more information please contact:



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Emmanuel Community is a member of the Ecumen family of senior housing and services



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Enclosed is my gift of \$ _____

In memory of In honor of Name: _____

From: Name: _____ Telephone No. _____

Address: _____ City _____ State _____ Zip _____

Please send an acknowledgement to the following:

Name: _____ Telephone No. _____

Address: _____ City _____ State _____ Zip _____

Please send me information about ways I can make other gifts while enjoying tax savings and other financial benefits.

*The information in this brochure is not intended as legal advice.
Please confer with your legal or financial advisor before
taking any action based on this information.*



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Ways to give a gift “in honor” or “in memory” of someone special in your life

Charitable giving is an important tradition for many people. Making gifts for the benefit of others offers a wonderful way to affirm your values and priorities. Honoring a loved one through charitable gifts is an especially meaningful way to pay tribute to someone special.

Here are some giving opportunities that can help you make your memorial gifts in the most effective and caring ways.

What is a memorial gift?

A memorial gift is a donation — large or small — made to commemorate a beloved friend or family member who has passed away. Some survivors specifically request that mourners make memorial gifts. In other cases, friends and family make a memorial gift of their own accord.

How can I make a memorial gift?

Simply send the gift to us with a short note indicating whom the gift commemorates. We will send notification of your gift (although not the amount) to the deceased’s spouse or children. We will also send an acknowledgement of the gift to you, and recognize your gift in our newsletter. Please let us know if you’d like your gift to remain anonymous.

SPECIAL OCCASION GIFTS

You can celebrate the life of someone special to you with a gift at times such as Mother’s Day or Father’s Day, at the birth of a child or grandchild, or on a birthday, anniversary or other notable occasion. These are gifts of love that show how much you care about the recipient.

Gifts of Cash: Many donors make a contribution with cash or checks. Such gifts are convenient and tax deductible.

- Donations of cash are generally deductible in amounts up to 50% of your adjusted gross income (AGI).

Appreciated Securities: Special gifts also may be funded with stocks or mutual funds that have increased in value. You not only receive a tax deduction, but you completely avoid the capital gains tax on appreciated assets given to charities. Because of this extra tax benefit, more and more people are choosing to make a donation with securities.

- When securities you have owned for more than a year are donated, you are entitled to a federal tax deduction for their fully appreciated value, not just their original cost. You will receive a federal tax deduction based on “paper profits” without having to pay capital gains tax.
- Gifts of appreciated assets are generally deductible in amounts up to 30% of AGI.

Please take this opportunity to honor or remember someone special by giving a gift that ministers to the seniors in our community. Your gift will celebrate someone special to you and directly strengthen our programs for seniors.

PLANNED GIFTS - A LIVING LEGACY

Many discover that their long-range estate and financial plans can provide a thoughtful way to make memorial gifts in honor of others. Consider the following ways to leave a legacy in memory of a special friend or loved one.

- A charitable gift included in your will or living trust can establish a lasting legacy in that special person’s name.
- A charitable gift of excess retirement funds, such as pension plans or Individual Retirement Accounts (IRAs) may allow you to give more while eliminating taxes that may otherwise largely deplete these assets.
- Gifts of life insurance that has fulfilled its original purpose may offer excellent tax benefits. Policies that you purchased to protect a loved one who no longer needs that protection can be an excellent way to make a charitable gift in honor of that person.
- Charitable gifts that provide an income can be a tax-effective way to provide you and/or someone else you designate with regular payments for life or another period of time.

Gifts made in any of these ways may serve to honor special loved ones. Your planned gift will help us build our endowment, which will support seniors in our community for generations to come. Kindly complete and return the form on the reverse side for more information.