



2705 S Berkley Road, Suite 3C
Kokomo, IN 46902

Phone: 765-453-7611

info@samaritancaregivers.org
www.samaritancaregivers.org

Help and hope for seniors aging
in place thanks to generous
support from:

Churches—Organizations—
Clubs—Businesses

and

CARING PEOPLE LIKE YOU



Heritage Club

Supporting
Independence

2019 IMPACT



230 seniors helped
506 volunteers
2,585 no cost trips
22,000 hours of help & hope

What a blessing it is to be a part of this wonderful organization. The people I have transported have all been gracious people. They thank me profusely but what they don't realize, I am really the one blessed.
Samaritan Caregiver Volunteer

Thanks to all the volunteers who donate their time, care and love for others. Without it, there would not be hope to know someone is there who loves and cares for me.
Samaritan Caregiver Client

WANT TO GIVE IN A MORE SIGNIFICANT WAY?

Planned giving can help you make charitable gifts while enjoying tax benefits and preserving economic value for you and your loved ones.

Interested in leaving a legacy to make a difference for the people who rely on Samaritan Caregivers? If you have a financial planner, let us meet with you both to devise a strategy tailored to fit your needs. If you do not have a financial planner, we have one available.

YOU do not need to be familiar with all the ways to make a gift. Just bring your heart for others and count on us to make it easier for you to select the best path.

Listed in this brochure are several ways to give, however, there are many more options available.

We hope that this will outline some of the possibilities for planned gifts to help you achieve your financial goals. Thank you for helping us help others...now and forever.

YOUR GOALS	YOUR STRATEGY	YOUR BENEFITS
Maximize your deduction; minimize the gift details	Use cash to make your gift to Samaritan Caregivers.	Claim your deduction against a larger portion of your adjusted gross income and make an immediate impact on Samaritan Caregivers
Afford a larger gift to Samaritan Caregivers and avoid capital gains liability	Give an appreciated asset held over one year	Buy low and give high – make a gift that costs you less than the benefit it delivers to us, while avoiding capital gains tax
Make a gift for Samaritan Caregivers future that doesn't affect your cash flow or portfolio now	Put a bequest in your will (cash, specific property, or a share of the estate residue)	Today – a gift that costs you and your family nothing. Tomorrow – an estate tax deduction
Retain income benefits from the assets you give to Samaritan Caregivers – thus afford a larger gift	Make a contribution to our pooled income fund. Create a charitable gift annuity or a charitable remainder annuity trust or unitrust	Receive income for your lifetime; receive a charitable deduction; diversify your holdings
Reduce high tax liability now; gain additional income later	Establish a deferred gift annuity	A larger deduction and a higher income rate than other life-income gifts offer
Tap one of the most valuable assets in your portfolio to make a gift to Samaritan Caregivers	Use real estate to make your gift to Samaritan Caregivers	Avoid capital gains tax, receive an income tax deduction – and have the option of a gift that doesn't affect your lifestyle
Reduce gift and estate taxes and control the timing of passing assets to your children and grandchildren	Create a charitable lead trust which supports programs at Samaritan Caregivers for a fixed, finite period with the principal going to your heirs.	Reduce gift and estate taxes, and freeze the taxable value of growing assets before they pass to your family
Avoid capital gains liability on the transfer of a business or partnership interest	Contribute the partnership interest or closely-held stock to Samaritan Caregivers	Avoid capital gain liability, receive an income tax deduction, and utilize a gift asset you may have overlooked
Locate an overlooked asset that you can easily give to Samaritan Caregivers	Name Samaritan Caregivers as beneficiary of your retirement plan; leave other assets to family	Eliminate income tax on retirement plan assets; free up other property to pass to your heirs
Make an endowment gift from income rather than capital	Create a new life insurance policy, or donate a paid-up policy whose coverage you no longer need	Increase your ability to make a significant gift to Samaritan Caregivers

EXPLANATIONS

1. Bequests are the most common way to make lasting gifts. List Samaritan Caregivers in your will, living trust or estate plan. This gift may be in the form of cash, securities, real estate or personal property. These documents should be drafted by an attorney and may be revised at any time.

2. IRA, 401(k), or Other Qualified Retirement Plan Assets may be used to leave a legacy by naming Samaritan Caregivers as the full or partial beneficiary.

3. Life Insurance can be used if you name Samaritan Caregivers as the owner/beneficiary of a new or existing policy - perhaps a policy that is no longer essential to your financial goals. Premiums on the policy you pay are tax deductible.

4. Charitable Gift Annuities create the opportunity for Samaritan Caregivers to pay a fixed income, usually for the life of the donor and/or spouse in exchange for a donor's irrevocable gift of cash, securities or other assets. The older the annuitants are at the time of the gift, the greater the fixed income that can be paid.

5. Charitable Remainder Trusts allow you to receive income (or provide income for another person) with the opportunity to make a substantial gift to Samaritan Caregivers. There is a choice of variable or fixed payments. Funding may come from assets such as real estate or closely held securities.

6. Charitable Lead Trusts enable you to make significant charitable gifts now while eventually transferring substantial assets to beneficiaries, who may benefit from significantly lowered gift and estate taxes. This more complex giving vehicle can be useful if you want to reduce your current income while retaining the assets for your family.