



Planned gifts provide for the future generations of children at Epworth.

A Legacy of Care

All through Epworth's existence, forward thinking individuals have remembered the children in their estate planning. The majority of these gifts have been relatively modest, but together these legacy gifts make the difference between minimally adequate care, and superior care. These estate gifts allow Epworth to welcome children regardless of their ability to pay for services.

Epworth is funded through three primary sources. Partial reimbursements from the Department of Social Services for children the Department places here is about 30% of revenue. Annual donations by individuals, church organizations, businesses and others are another 30%. The major source of funding is derived from the income earned from Epworth's endowment.

Estate gifts, unless otherwise directed, are placed in the Epworth endowment to support the children now and for generations to come.

Common Planned Gift Methods

Estate planned gifts can be made in a variety of forms. The following includes some of the more popular forms with brief descriptions:

Charitable Gift Annuity*

A Charitable Gift Annuity can be established with cash or appreciated securities which can provide income to the annuitant. After the lifetime of the annuitant(s), the charitable remainder interest in the gift would become available to Epworth Children's Home.

Charitable Remainder Annuity Trust*

A charitable remainder annuity trust is an irrevocable trust that provides fixed payments to one or more beneficiaries for their lifetimes or a period of years. When the trust terminates, the remaining value becomes available to Epworth Children's Home.

Charitable Remainder Unitrust*

A charitable remainder unitrust is an irrevocable trust that provides variable payments to one or more beneficiaries for their lifetimes or a period of years. The payments vary based on the annual fair market value of the trust. When the trust terminates, the remaining value becomes available to Epworth Children's Home.

Bequest

A bequest is a gift made by including Epworth Children's Home as a devisee in one's will. The gift can be a particular amount of money; all, or a percentage of the estate; or a gift of a specific asset such as a piece of real estate or a financial security.

Life Insurance

A gift of life insurance can be made by naming Epworth Children's Home as the owner and beneficiary of an existing, in force, life insurance policy or by purchasing a new policy with Epworth named as the owner and/or beneficiary.

Other Direct Gifts

Direct Gifts of Real Estate, Individual Retirement Accounts, or other Qualified Retirement Plans may also be used as a part of planned giving. Please consult Epworth staff and/or your financial/legal advisor for more details.

**Consult your financial/legal advisor to establish charitable giving vehicles and designate Epworth as the beneficiary.*

The Importance of Planned Gifts

Planning your estate is an important task. The financial, tax and legal implications in the planning process can have a major impact for you and your loved ones. As you prepare your documents, consider this: *how you want to be remembered?*

Leaving a planned gift to Epworth can be an important part of your legacy. A planned gift for the benefit of the children at Epworth can:

- Provide tax incentives for you, your estate, and your heirs;
- Create peace of mind knowing that your wishes and priorities will be followed;
- Lessen the burden for heirs by clearly communicating your desires;
- Exhibit the importance of caring for abused and neglected children to your heirs and future generations;
- Provide loving care for the children who will come to Epworth in the following generations.

Talk to your financial/legal advisor or contact Epworth Children's Home to begin the process of leaving a planned gift. Your plan makes a difference, get started today!



The Society of 1896

All persons leaving a planned gift or bequest that exceeds \$25,000 will be included in the Society of 1896 when Epworth is notified of your planned gift or bequest.

All Society members are recognized as members on a plaque that hangs in the Administration Office at Epworth Children's Home. Gifts are also listed in our newsletter upon receipt of the gift.

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THE EPWORTH PLANNED GIVING PROGRAM

FOR THE FUTURE GENERATIONS
OF CHILDREN AT EPWORTH



Invest. Care. Transform.

INVESTING IN COMPREHENSIVE CARE
TRANSFORMS THE LIFE OF A CHILD.