

About ADD

Our purpose at ADD is to provide the optimum level of **quality rehabilitative services** to all individuals living within our residential program. We provide a healthy, safe, and homelike environment, in which individuals may achieve the **greatest level of independence** possible. ADD strives to surpass all requirements of OMH, OPWDD, federal, state and local authorities. We are guided by our core of values:

- Respect
- Choice
- Trust
- Empathy
- Dignity

We believe that every individual has value and the potential to learn and achieve goals. We do everything to **inspire self-esteem**, and encourage individuals to help each other and work together whenever possible. We aim to achieve fulfillment for every individual and employee by providing innovative and progressive programming and training. We are consistent in providing competent and compassionate staff who are role models for the people they serve. Standards of excellence are adhered to and monitored, as we work to achieve continuous improvement in all areas. ADD is dedicated to creating an environment where individuals are given the opportunity to be productive members of their community.

Special Blessings™

*Making a Gift in Trust
for Birthdays and Other
Special Occasions*



How Will You Be Remembered?

Everyone wants to leave behind a non-material legacy – one that reflects the relationships we cherished, the impact we've had on others, and the truths and values by which we lived. That kind of legacy lives on in our children and in others whose lives we've touched.

Though most of us do our best to teach our children humanistic values, such as being kind and generous, especially to those less fortunate, there is no better way to instill values than to lead by example. It is never too early to begin.

That's the idea behind ADD's *Special Blessings* program. It's a unique way to make a gift to a child, grandchild or other loved one on a special occasion, instilling some of your personal values at the same time.

Appropriate Special Occasions

Certain occasions are especially popular for an annual remembrance gifts. Among them:

- the birthday of a child, niece, nephew or grandchild
- the birth of a new baby
- a wedding, anniversary or engagement
- a confirmation or bar/bat mitzvah
- a graduation or other significant personal accomplishment
- special holidays

How It Works, In a Nutshell

You make a gift of \$5,000 or more (in cash or securities) to a trust for ADD, which invests the funds, with the understanding that, each year, for five years, an individual you name will receive fixed payments of at least \$250, from the income. Usually, a child or grandchild is the individual receiving the income, but the recipient can be anyone at all.

Each year, the check arrives, enclosed in a special greeting card designed by a student from ADD. In this way, your loved one gradually becomes acquainted with your philanthropic values, and learns that a portion of their special gift is helping to provide essential care for children and adults challenged by disabilities.

Tax Benefits

An added benefit of our *Special Blessings* program is the favorable tax treatment it receives. Since your gift will ultimately benefit charity, it qualifies for a substantial income tax deduction (at the time of this writing, it is approximately 77%). If you use appreciated securities that you have owned for more than a year to make your gift, you may also avoid capital gains taxes.

In addition, although your gift would provide a financial benefit to a loved one, it also reduces your taxable estate, and any associated estate tax liability.

How to Establish a Gift in Trust

Instructions for your attorney, along with a specimen trust document for his or her reference, have been enclosed with this brochure. Review all the materials with your attorney, who will then draft a trust agreement consistent with your requirements and our program. Mail an original, signed trust agreement, along with a check made payable to "Aid to the Developmentally Disabled" to:

Charles Evdos
Executive Director
Aid to the Developmentally Disabled
901 East Main Street, Riverhead,
NY 11901

For an added tax benefit (avoidance of capital gains tax), your donation may also be made with marketable appreciated securities, or, for your convenience, through a major credit card.

For securities transfer instructions or additional information, contact A D D's Executive Office, at (631) 727-6200 or CEvdos@addny.org

Trust Income/Tax Deductibility

<u>AMOUNT PLACED IN TRUST</u>	<u>YEARLY INCOME TO BENEFICIARY</u>	<u>CHARITABLE INCOME TAX DEDUCTION*</u>
\$5,000	\$250	\$3,843
\$10,000	\$500	\$7,685
\$20,000	\$1,000	\$15,370

* assumes a 4% IRS "discount" rate and that payments begin immediately