

# Heart of The Arc s o c i e t y

*Caring for our future*



## CONTACT US

The Arc of San Francisco has experienced planned giving resources that can assist you in making a gift that benefits you and your loved ones while giving you the satisfaction of enabling people who are developmentally disabled achieve greater independence and dignity through the services and supports we offer. To learn more about how a planned gift facilitates a special partnership between you, your family and The Arc of San Francisco, contact:

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The Arc of San Francisco  
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## FOR ADVISORS

Founded in 1951, The Arc of San Francisco is a 501 (c) 3 organization incorporated in the State of California. The mission of The Arc of San Francisco is to empower individuals with developmental disabilities by providing a variety of services that enable them to participate more fully as active and contributing members of the community. With a staff of over 180, The Arc currently supports over 475 people in San Francisco and San Mateo Counties, including support to their families. Our goal is to provide our clients with the means to lead comfortable, productive lives in their community and to enjoy the freedom and opportunities everyone deserves.

Contributions to The Arc of San Francisco are tax-deductible to the extent allowable by state and federal law. Our federal tax identification number is: 94-1415-287.

*This information provided in this brochure is not intended to give specific financial or legal advice. Please consult your financial and legal advisors, or contact The Arc Development Office for a referral.*



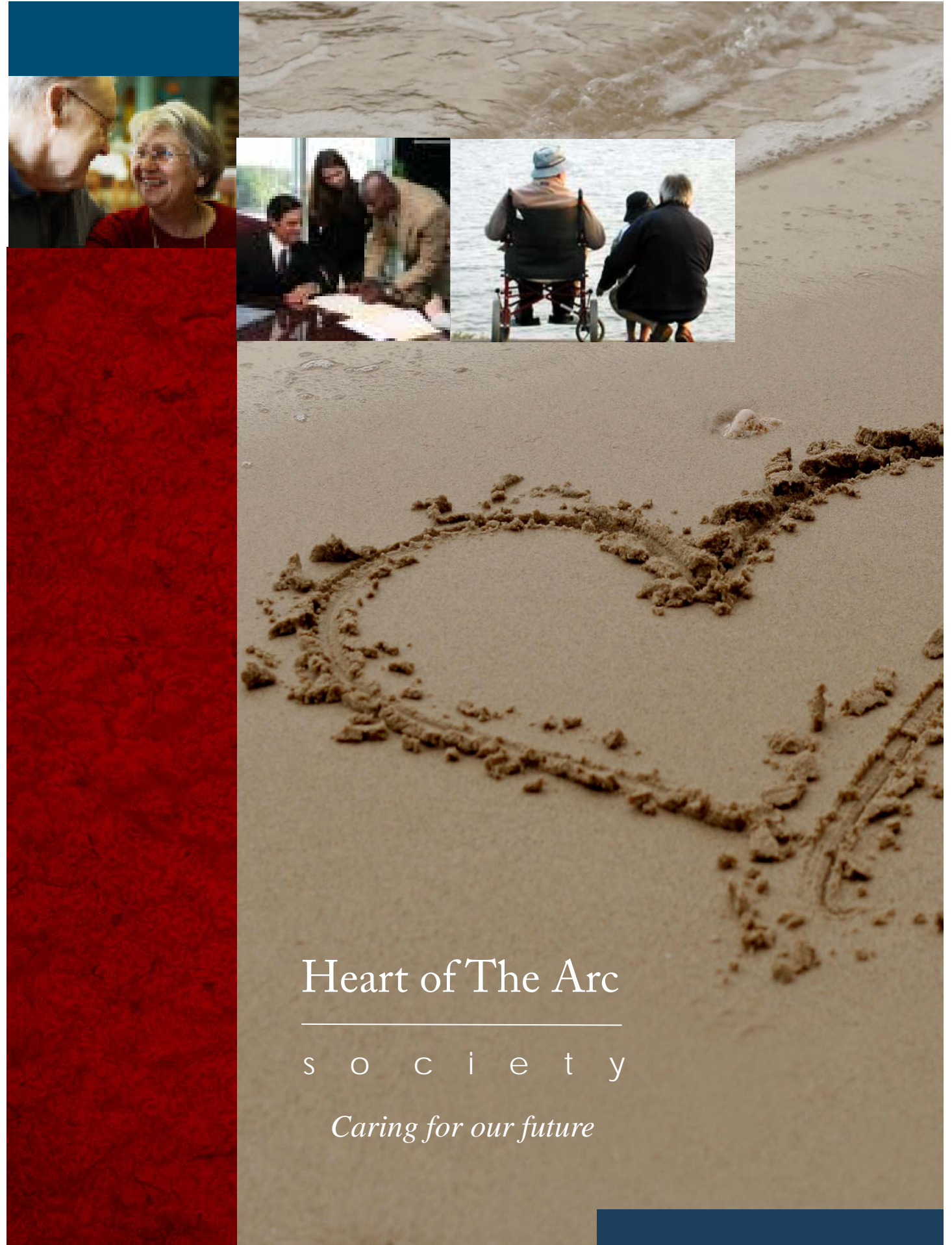
*The Resource for People with  
Developmental Disabilities*

1500 Howard Street  
San Francisco, CA 94103  
tel: 415.255.7200  
Fax: 415.255.9488

[www.thearc.org](http://www.thearc.org)

The Arc of San Francisco serves people with developmental disabilities, individuals with similar needs and their families by providing access to a full range of services that advance self-determination, dignity and quality of life.

We focus on the following services:  
Advocacy, Employment, Housing, Arts & Leisure, Aging Supports & Services.



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## CREATE A LASTING GIFT THAT MAKES A DIFFERENCE



At some point in a life well spent, we may consider the future and think about how the fruits of our labor can continue to help others. A planned gift to The Arc of San Francisco is a gift from the heart, ensuring that the services we provide to our clients are protected and create a future with more opportunities for people with developmental disabilities to achieve their highest potential.



Our Heart of The Arc Society can help you plan for the future and security of your loved ones while offering you numerous options to support our work in a way that meets both your financial and charitable goals.

In addition to providing a lasting legacy, your charitable gifts are a useful financial tool that can provide you with a source of income, possible tax deductions and many other benefits. Our Development Office can help you determine the best way to plan your legacy.

### Bequests

You may wish to defer a gift until after your lifetime by naming The Arc of San Francisco in your will as one of the beneficiaries.

A bequest may include an outright gift of a designated amount, a percentage of your estate, or the remainder of your estate after making specific gifts to family and friends. There can be considerable tax advantages for your estate and your heirs. Charitable gifts are 100% deductible from your taxable estate.

Your bequeathed gift may take many forms:

A Gift of Cash	Stocks and Bonds
IRAs and Pension Plan Assets	Closely Held Stock
Life Insurance	Real Estate

#### *A Simple Bequest*

Your bequest might be worded as follows: "I HEREBY GIVE, DEVISE, AND BEQUEATH TO THE ARC OF SAN FRANCISCO, 1500 HOWARD STREET, SAN FRANCISCO, CA 94103 THE SUM OF \$\_\_\_ OR\_\_\_% OF MY ESTATE TO BE USED IN SUPPORT OF ITS MISSION TO ENHANCE THE QUALITY OF LIFE FOR PEOPLE WITH DEVELOPMENTAL DISABILITIES."

#### *IRAs and Pension Plans*

You may designate The Arc of San Francisco as a beneficiary of your retirement plan, IRA, 401(k), 403(b), Keogh, or other qualified plans. This can relieve your estate of taxable income, and can reduce inheritance taxes for your heirs.

### *Life Insurance*

A gift of life insurance can be given either during your lifetime or after. You may purchase a new policy or donate a policy that you currently own but no longer require. You may also realize a significant year-end charitable deduction. Designating The Arc as both the policy owner and beneficiary will qualify you for that deduction. This provides The Arc with a significant gift at a low cost to you, and can give your estate beneficial tax savings.

If you have term life insurance, you may simply designate The Arc of San Francisco as your beneficiary.

### Life Income Gifts

There are many gifts that you can give today and receive income and tax benefits during your life.

#### *Charitable Gift Annuities*

The Charitable Gift Annuity is a gift that can allow you to fulfill your charitable intentions toward The Arc while providing you with a fixed income for life. There are certain tax advantages, particularly when the gift is funded with appreciated stock. The Charitable Gift Annuity can be most beneficial to individuals or couples (partners or friends) who are 65 or over. The older you are the higher the rate of income you may be able to receive.

#### *Pooled Income Fund*

A Pooled Income Fund is an investment tool that combines the deferred gifts of many donors and pays the individual beneficiaries their proportionate share of all the income earned. Contact the Development Office at The Arc of San Francisco if you are interested in knowing current rates and the best life income gift for you.

### Other Types of Deferred Gifts

#### *Charitable Remainder Trust*

A Charitable Remainder Trust (CRT) can be established with cash or appreciated assets to provide you or a nominated beneficiary with income for life. At the end of the CRT's term or the beneficiary's life, the remaining portion is transferred to The Arc of San Francisco as your charitable remainder gift.

#### *Charitable Lead Trust*

Lead Trusts provide income to The Arc for a specific period of time. At the end of that time, the assets held in the trust are distributed to you or to your beneficiaries. This type of trust can result in significant estate tax savings.

#### *Retained Life Estate*

Make a gift of real estate such as your home, condominium or apartment complex to The Arc while retaining the right to live in and use the property and you can realize generous income tax deductions. This type of charitable gift is particularly worthy as it can provide much needed housing for people with developmental disabilities.



"My daughter has a life she's proud of—and I'm so proud of her. We started out with small dreams for her, but The Arc has shown us that even small hopes can grow into big possibilities with the right support.

I made a charitable gift to The Arc because the work they do means so much to my family, and I want to see all people with developmental disabilities reach their full potential like my daughter.

—Mother of a client of The Arc and planned gift donor