

The Arc Caddo-Bossier Foundation

Planned Giving Options

The Arc Caddo-Bossier Foundation is passionate about supporting people with disabilities to reach their full potential as productive citizens. We invite you to explore the benefits of planned giving while establishing a legacy and ensuring the future of vital programs for people with disabilities.

The Arc Caddo-Bossier Foundation exists to support the mission and ensure the financial stability of The Arc Caddo-Bossier and its affiliates (Goldman School, Conly Center, Frost Industries, Great Results Equine Assisted Therapies, Louisiana Disabled Persons Housing Corporation, and Residential Services) by generating and accepting contributions, creating and administering funds, and making grants or loans that support both startup and ongoing programs. As you review your financial and estate planning, please consider The Arc Caddo-Bossier Foundation. The Arc Foundation can save you tax dollars through the charitable deduction and the avoidance of capital gains taxes.

There are many Planned Giving Options, but summarized below are options for your review.

- **Charitable Remainder Unitrusts**

A charitable remainder unitrust allows you to make a substantial gift to The Arc Foundation and yet continue to receive income from the assets contributed. Your gift is administered separately as a trust.

- **Charitable Remainder Annuity Trusts**

Annuity trusts are very similar to unitrusts except that, with an annuity trust, the life income beneficiary(ies) receive(s) annually a fixed dollar amount, rather than a fixed percentage of the assets in the trust.

- **Charitable Lead Trusts**

The creation of a charitable lead trust allows you to pass significant assets on to younger family members with little or no gift or estate tax payable to the government. Under this arrangement, you transfer assets to a trustee who would then make annual payments to us for a specified number of years, after which time the assets remaining in the trust would go to your children, grandchildren, or others.

- **Gifts of Life Insurance**

Life insurance provides another excellent means for making a gift to The Arc Foundation. This can be done either by purchasing a new life insurance policy or by contributing a policy which you currently own, but no longer need.

- **Gifts Through Your Will**

If your estate is subject to the federal estate tax, a charitable bequest can save significant tax dollars. The Arc Caddo-Bossier Foundation can be named as a beneficiary in your will in a number of ways.

- **Gifts of Retirement Plan Proceeds**

Retirement Plan Proceeds provide an excellent means for making a gift to The Arc Foundation. This can be done by designating The Arc Caddo-Bossier Foundation as the beneficiary of your IRA or 401K on the beneficiary election form provided by your pension administrator.

For Additional Information:

This document summarizes some of the more common and familiar Planned Giving Options, but there are many others. Always check with your accountant, attorney, financial advisor and/or tax advisor for additional information on how general rules apply to your particular situation. The Arc Caddo-Bossier Foundation appreciates your interest and support. We would be pleased to meet with you or provide you additional information.

Leann Anglin
Director of Resource Development
The Arc Caddo-Bossier
318-221-8392, Ext. 268
langlin@thearccaddobossier.org
351 Jordan Street
Shreveport, LA 71101

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The Arc Caddo-Bossier is not engaged in legal or tax advisory services. For advice or assistance in specific cases, the services of an attorney or other professional advisor should be obtained. This information is provided as a service. The Arc Caddo-Bossier strives to provide accurate information of a general character, but makes no claims, promises or guarantees about the accuracy, completeness, or adequacy of the contents of this information and expressly disclaims liability for errors and omissions in the contents. State laws govern wills, trusts and charitable gifts made in contractual agreement. Advice from legal counsel should be sought when considering these types of gifts.

Upon request we can provide you with more detailed information as well as The Foundation Gift Acceptance Policy.