



Securing Futures

Legacy Circle member Bob Neigh believes that the future is built by those who plan for it. His brother Phil has received Unity House services in Ithaca since 1988. Bob began making regular donations to Unity House because he believes in our mission.



"Sharing is a basic human value," Bob said. "If I have enough to live comfortably, it's important to share with people who don't."

Years ago, Bob created a special needs trust for Phil, then adjusted his own estate plans. When Bob dies, his estate will flow into the trust for his brother, ensuring that Phil will have whatever he needs for the rest of his life. Upon Phil's passing, a percentage of that trust will become a donation to Unity House's endowment fund.



Your Gift, Your Legacy

Your gift to Unity House's endowment will be held in perpetuity. The fund generates investment income to support people with disabilities every year, forever.

Most estate gifts cost you nothing today. By letting Unity House know of your plans, you allow us to show our gratitude during your lifetime, long before your gift is realized.

Those who advise Unity House of their planned gifts become members of our Legacy Circle. Members are invited to attend special events and are listed with honor in Unity House's annual report.

Make Your Plan Now

Your peace of mind is important. To learn more about planned giving at Unity House, please visit or scan:



unityhouse.org/planned-giving-program

To start a conversation, please call

315-253-6227 ext. 360

or email

development@unityhouse.org



217 GENESEE STREET, AUBURN, NY 13021
www.unityhouse.org • 315.253.6227 ext. 360

EIN #16-1081372



FOR THE NEXT GENERATION



Planned Giving to Support People with Disabilities

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What is PLANNED GIVING?

Planned Giving is the practice of naming a charity in your will, or designating a major gift to a charitable organization. The gift could include cash, real estate, life insurance, investments, or personal property.

By making a planned gift, you shine your light into the future. You spare your loved ones from difficult decisions at a difficult time. You ensure that your values live on after you pass. And with help, your plan can save you money, allowing you to provide even more for the next generation.

We believe that people with developmental disabilities, mental illness, and substance use disorder deserve a shot at a good life. If that aligns with your values, a planned gift can ensure that your support continues long after you pass.



Our Planned Giving Advisory Council can Help

To help you decide which options would benefit you most, we recommend you consult a professional estate planner, attorney, or licensed financial advisor. Unity House's Planned Giving Advisory Council includes experts in all of these fields. Twice a year, they offer free estate planning events open to the public.

For more information on their areas of expertise and how they can help guide you, scan the QR code, visit unityhouse.org/planned-giving-advisory-council or call **315.253.6227 ext. 360.**



Your Estate, Your Choices

Unity House provides several ways to make thoughtful gifts. Some of the most common options are below:

YOUR GOAL	GIFT TYPE	WHAT TO DO	BENEFITS
Make an easy gift	Outright donation	Donate cash, securities, real property	Income tax deduction; avoid capital gains tax
Avoid capital gains tax on sale of real estate	Real estate gift	Donate property or sell it to Unity House below market value	Immediate income tax deduction; avoid capital gains tax
Defer a gift until after your lifetime	Bequest in your will	Name Unity House in your will	Donation exempt from federal estate tax
Avoid double tax on retirement plan assets	Retirement plan gift	Name Unity House as beneficiary of assets post-life	Avoid heavy tax on gift heirs, allowing less costly gifts
Make a large gift with little cost to yourself	Life insurance policy	Name Unity House as owner and beneficiary on policy	Current income tax deduction; potential estate tax reduction
Ensure lifetime support for a relative with special needs	Supplemental or special needs trust	Name Unity House as remainder beneficiary	Allows relative to share in estate without risking governmental benefits
Make a revocable gift during your lifetime	Living trust	Name Unity House as beneficiary of assets	Control of trust during lifetime; possible estate tax savings