

THE PEOPLE INC. FOUNDATION EXISTS TO INSPIRE AND EMPOWER OUR SUPPORTERS TO MAKE A DIFFERENCE IN THE LIVES OF PEOPLE WITH SPECIAL NEEDS.

A Message from the Executive Director



If you're like me, you may have started the year considering New Year's resolutions. I did what's probably pretty typical –

focused inward on myself.... What do *I*, as an individual, want to achieve? What do *I* want to do better at this year? A few things came to mind quickly and I continued to jot them down. When I looked back at it, I realized... the list contained a few things only I can impact, as well as a good percentage of things that also rely on other people.

We're surrounded by examples of teamwork and challenges that require it. The recent Super Bowl and winter Olympics gave teamwork a public stage – even the individual Olympian has a team that has supported and contributed to their success. At People Inc., the care provided to individuals with disabilities has always been through team efforts of clinical and direct support professionals. Everything we achieve – from the celebration of a personal goal finally

reached after much concentrated effort, to opening our first diverse apartment building in Tonawanda last year – requires the hands of many working together.

We consider you an important part of our team. Every time you write a letter to an elected official to help advocate, every time you make a donation or renew your annual membership, every time you meet with staff to overcome a challenging issue, you're contributing to our team goals.

We also want you to consider us part of your team. Our program staff is committed to working with you to support your family member in reaching their next goals. Our management team is committed to listening to your ideas and concerns, thoughts and wishes as they help propel continued improvement and new service development. Our Foundation team and Board are committed to careful stewardship of your donations, and helping you explore different options of support that meet your wishes now, and for the future.

In this edition, you'll hear from Victoria D'Angelo, an attorney and

local leader in estate planning, about her experience in how important teamwork is when making gift plans. Please consider **using our resources as part of your personal team** – attend one of our conversation sessions, to be held April 17 and 24, or schedule an hour to talk with Christine, our legacy officer. Whether it's just to process your thoughts, help prep for an upcoming meeting with your attorney or advisor or learn more in general, this team resource is available to all of our families with no obligation, fee or cumbersome process – just a phone call or email to take advantage of it.

Thank you for all you've done to achieve great things in 2017, and looking forward to even more this year!

Best,

Denise M. Bienko, MPL, VP

Please share your thoughts or questions with me directly at dbienko@people-inc.org or at 716.817.7470

"Start where you are. Use what you have. Do what you can." ~ Arthur Ashe

People Inc. Foundation Presents

"You and Planned Giving"

A conversation about what is really important to you and your loved one with special needs



Tuesday, April 17, 2018

6 to 8 p.m.

Ilio DiPaolo's Restaurant
3785 South Park Avenue, Blasdell, NY



Tuesday, April 24, 2018

6 to 8 p.m.

Protocol Restaurant
6766 Transit Road, Amherst, NY

With our compliments, come join us for dinner and learn how to connect your values with future planning through group and individual Q&A.

Seating is limited. Kindly RSVP by April 13 to Christine Mathieu at cmathieu@people-inc.org or 716.817.7256

What's Inside

Drive Fore Disabilities Golf Tournament and Auction

Communication is VITAL to the Success of your Estate Plan and Legacy Gift By Victoria L. D'Angelo, Special Counsel – Guest Contributor

Become a Supporting Member for 2018!

Shop and Amazon Gives!

Never judge a book by its cover By Beth A. Montague – People Inc. Foundation Charitable Legacy Society Member, Parent and People Inc. Foundation Board Member

Charitable Gift Annuities – How do they work?

2017 Donors

Volunteer Profile: Allied Mechanical

Did You Know?

Interested in receiving a guaranteed income for life, a savings deduction, tax-free income, WHILE supporting the future of People Inc.? Ask about our Charitable Gift Annuity!



Info: Christine Mathieu
Legacy Officer
cmathieu@people-inc.org • 716.817.7256

For more information about **Legacy Gift Planning and The People Inc. Endowment**, contact Denise Bienko at dbienko@people-inc.org, 716.817.7470 or Christine Mathieu at cmathieu@people-inc.org, 716.817.7256.

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Mitsubishi Electric, Cooling & Heating
National Fuel Gas Company Foundation
Northeast Mechanical, Inc.
Nova Healthcare Administrators
O'Bannon & Davis Inc.
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Parkview Health Services
Philadelphia Insurance Companies
Pro Benefits Administrators
Quantum Rehab - Pride Mobility Products
Roto-Rooter Services Company
Ryan Purcell Memorial Fund
Sharp General Contracting Inc.
Takats Foundation
The Ultimate Software Group, Inc.
Thomann Asphalt Paving Corp.
Thomas Golisano Life Enhancement Fund
Timrick Management, LLC
Towne Automotive Group
UCLA EMPH Cohort 2018
United Business Systems
Value Drug Co.
Vanner Insurance
Walsh Duffield Companies, Inc.
We Care Transportation
West Herr Automotive Group
Wm. C. Rott & Son

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Message from Legacy Officer – Christine Mathieu



As you can imagine, over the past year I have had numerous conversations around Legacy Gifts and Charitable Giving with parents, donors, members of senior leadership, board members and professional advisors. As a former financial advisor and coach, I wasn't surprised by what caught my attention ... the beliefs that **you must have a lot** in order to be in a position to make a difference or that **someone else may lose out** (such as another family member) when a legacy gift is made.

Regardless of whom I am speaking with about leaving a legacy to People Inc., when the conversation is centered on how much this agency means to the family and their loved one with special needs, their faces light up and their words are unmistakably heartfelt.

It is the same when a parent or family member is given the space to talk about the future of People Inc., what their hopes and visions are for the agency and for their loved ones with special needs. Something happens when you begin to connect with your vision, when you begin to believe that you can make a difference in the lives of others, and that your vision may stand a chance at being realized.

In an effort to communicate more effectively with our readers, offer more value in terms of resources, while being mindful of our expenses, **we ask that you consider sharing your email address with us.**

Electronic communication has become one of the most powerful ways to communicate important and timely information and we want to be sure that we are doing everything we can in keeping an open line of communication with you.

Please email foundation@people-inc.org, and in the subject line write: Add me to mailing list.
Thank you for your support!

It is at THAT moment, just when you are beginning to believe ... that doubt enters your mind and the light in your eyes extinguish.

Thoughts around "I don't have enough" or "if I give to this cause, then I or they will have less or will have to go without," overtake any thoughts of hope. It is unfortunate that as a society, we are programmed to believe "there's not enough for all" ... especially when there are causes and missions we feel compelled to support!

However, that belief isn't true. There is in fact, enough. And you can provide for the future of People Inc. and the people we serve, right now.

Over the past year I have met with several talented professional and trusted advisors in Western New York and created a network, a resource for those interested in finding creative and meaningful ways in which to make a legacy gift.

My advice is always this ...

1. **Start where you are.**
2. **Use what you have.**
3. **Do what you can.**

There are many ways in which you can leave a legacy gift to People Inc. without feeling as though you have "lost" something. All it takes is a conversation with either myself or

your trusted advisor about what it is you would like to see for the future of People Inc. and how you would like to make an impact.

You will be surprised at the potential you already have in leaving a legacy ... and supporting an agency's mission you care very much about and the community it serves, well into the future.

REMINDER: If you are a member of the People Inc. Charitable Legacy Society, a donor and/or a family member, expect to hear from me because I want to get to know you. I want to know what is important to you in terms of what you envision for the future of People Inc. and your Legacy. Through your story, I hope to inspire others to think about their own Legacy Plan/Charitable Bequest.

Thank you for listening – I look forward to meeting you!

Christine Mathieu, Legacy Officer –
People Inc. Foundation

If you would like to share your story with me sooner than later, please feel free to contact me directly! I can be reached at cmathieu@people-inc.org or 716.817.7256.



Help us for our golf and auction event on Monday, August 20! Spread the word to see if your company would sponsor a golf team or purchase a tee sign. Support us by obtaining silent or live auction items like entertainment events or unique and coveted items! To assist with our event or if you have questions, contact Melanie Brown at mbrown@people-inc.org or 716.817.7450.



Communication is VITAL to the Success of your Estate Plan and Legacy Gift

By Victoria L. D'Angelo, Special Counsel
– Guest Contributor



It is important for an estate planning attorney, the financial advisor, the accountant and the client/donor to keep the lines of communication consistently open and fluid.

Several years back, I worked on and updated an estate plan for a client, a widow and we included various specific bequests in her Will to benefit grandchildren, friends and **charities**. As part of the plan, we reviewed and discussed her assets and those that would be available to pay/fund those bequests upon her passing. We also updated the beneficiaries on other assets/investments such as retirement accounts and life insurance.

When the client died two years later and the estate was being worked on, it was discovered that just two months prior to her death, the financial advisor had changed the title on a large portfolio account to a TOD (Transfer on Death) account naming various children. But that account was intended to be used to pay the various bequests per the terms of her Will which included charities ... and unfortunately there were no other accounts to fund those bequests. Had it not been for a piece of real estate that was eventually sold, all those individuals and charities named to receive such specific bequests would have received nothing. Most importantly, the wishes of my client would not have been honored.

If it is your wish to leave gifts to benefit your family or charity, I cannot say enough of how important it is that your estate planning attorney and financial advisor(s) maintain an open line of communication. And this would include EVERY time you update, amend or revise your estate plan as well as your financial accounts, investments, assets. All parties must be on the same page. Sometimes a TOD account may work but more often than not, the client may have other people they want to benefit in their estate plan or may have trusts they wish to fund in their Will. As the estate planning attorney, I am continually contacting financial advisors as to beneficiary changes and also communicate with the accountants about tax aspects.

Proper estate planning is a team effort so the client's wishes and goals are fully met.

A Case Study of Benefits

Jack, age 72, is recently widowed and has just received life insurance proceeds from his wife's policy of \$100,000. Jack also has a daughter (age 47) that has been residing in a People Inc. group home since she was 20 years old.

Jack and his wife, before her sudden passing, had been talking about making a legacy gift to the People Inc. Foundation ... they wanted to find a way to help support the agency that has cared for their daughter and contributed to her happiness for so many years.

Upon receiving the \$100,000, Jack thought it would be timely to honor the wishes of he and his wife but, he also would like to increase his monthly income for a bit of a "cushion" in case an unexpected expense arose.

Jack decides to give the cash (\$100k) to a People Inc. Charitable Gift Annuity that we will issue at the payout rate of 5.15 percent and will receive a guaranteed monthly income of \$416 for the remainder of his life. He would also qualify for a \$52,087* charitable deduction for 2018, and a portion of his income will be tax-free.

What truly pleased Jack was to know that upon his own passing, the remainder of his annuity would go directly to the **People Inc. Foundation**, where **his legacy gift would help to provide for the future of the agency he and his wife had grown to love and appreciate.**

If you or a family member are interested in learning more about Charitable Gift Annuities or would like to receive a **free illustration of benefits**, contact Denise Bienko at dbienko@people-inc.org, 716.817.7470, or Christine Mathieu at cmathieu@people-inc.org, 716.817.7256.

*these calculations are for illustration purposes only and should not be considered legal, accounting, or other professional advice. Your actual benefits may vary depending on several factors, including timing of gift and marginal tax bracket.

Current Rates (single life):

Age	Payment Rate*	Guaranteed Annual Income**
65	4.45%	\$445
70	4.85%	\$485
75	5.55%	\$555
80	6.55%	\$655
85	7.55%	\$755
90	8.75%	\$875

*People Inc. Foundation CGA Rates - 2018
**ANNUAL Income based on a \$10,000 gift

Q: Making a legacy gift for a charity or non-profit organization seems complicated, is there an easy way to do this?

A: Yes, there IS an easy way to make a legacy gift for an organization you care about. A quick and easy way to leave money for the benefit of a charity is to name the charity (or charities) as **beneficiary of your pension plan, IRA, 401k plan, or other retirement asset**. Doing so can avoid estate and income taxes that might otherwise be due when your plan is paid out. All you need is to submit a "change of beneficiary form" for said accounts HOWEVER, while this is a simple change with a simple form, be sure to seek the advice of your financial advisor, accountant, and attorney when designating a charity as primary or partial beneficiary of a retirement account.

** If you are looking for a professional advisor for guidance in charitable giving, contact Christine Mathieu at cmathieu@people-inc.org or 716.817.7256 for references.

Charitable Gift Annuities – How do they work?

Strengthen your future and support our mission

The concept of a **charitable gift annuity** is nothing new, but its benefits will never grow old! In America, the idea dates back to 1843 when a Boston merchant donated money to the America Bible Society in exchange for a flow of payments ... *income for life.*

Today, it's not uncommon for folks to look for ways in which to create a guaranteed fixed income stream and there are several creative ways in which you can do this. **BUT ...** what if you wanted to find a way to **support the future of People Inc. via a Legacy Gift** as well? **Could you do both?**

Yes! A gift annuity is an extraordinary way to make a charitable gift, provide a steady income, and cut your tax bill ... all in one simple transaction. And what you may not know is that not all charities can offer Charitable Gift Annuities however, through the People Inc. Foundation, we can!

A **People Inc. Charitable Gift Annuity** is a contractual agreement between a donor and the People Inc. Foundation in which the donor give assets in exchange for the Foundation's promise to provide the donor with payments for life. Upon your death, any unused portion of the gift annuity remains at the People Inc. Foundation and **becomes your permanent legacy toward a cause that truly matters to you – our mission.**

Charitable Gift Annuities



FIVE WAYS YOU WIN:

- 1 Income for Life**
You receive an attractive payout rate for one or two lives.
- 2 Tax Deduction Savings**
Part of your initial contribution is tax-deductible the year of the gift.
- 3 Tax-Free Income**
A portion of each annuity payment is a tax-free return of principle during the years of your life expectancy.
- 4 Capital Gains Tax Savings**
When you contribute appreciated property for a gift annuity, you minimize taxes on your capital gain.
- 5 Personal Satisfaction**
By your generosity you are providing lasting support to People Inc., a charitable organization that you care very much about.

You can establish a charitable gift annuity with the People Inc. Foundation within a matter of days, with just \$5,000 or more.



PEOPLE INC. FOUNDATION CHARITABLE LEGACY SOCIETY MEMBERS

- | | | |
|---------------------|--------------------------|-----------------------------|
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| Bonnie Bruning | Horace Mann | James Swagler |
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****Special acknowledgement and welcome to our newest Legacy Society Members ... Bonnie Bruning • John Caselinuovo • Michael and Sandra Smith • Nancy M. Conley**

Thank you for your thoughtfulness and generosity. Your planned gifts will afford People Inc. the opportunity to continue its mission well into the future ... and for this we are most grateful.

Become a Supporting Member for 2018! *People Inc. Supporting Members Make a Difference!*

People Inc. Supporting Members are special supporters who pledge a recurring gift of \$10 a month or a one-time gift of \$100 or more annually. Please join on and pledge your membership for 2018 now. Supporting Members also receive some great (and new!) benefits, including:

- People Inc. Foundation Calendar, along with an additional calendar mailed to a person of your choice
- Certificate of Appreciation
- VIP status at our annual Supporting Member event
- Personal updates throughout the year
- Inclusion in published donor listings



For a limited time, KeyBank has partnered with us and has pledged to match new Supporting Member gifts, up to the first \$10,000! **So, your \$100 gift will go farther with KeyBank's matching gift!** We are happy with this opportunity to stretch your gift to make a greater impact. To become a Supporting Member, complete and return the enclosed envelope. For questions, feel free to contact Jennifer Robinson at jrobinson@people-inc.org or 716.817.7269.

Our **Charitable Legacy Society** was created to honor those who have taken a significant step to include the People Inc. Foundation in their **planned giving efforts**. Whether through a bequest, life-income or other deferred giving plan, we thank and recognize all involved. Their lasting gift furthers the future and mission of People Inc.

The following commitments qualify you for membership in this particular group:

- **A bequest provision** in your will or trust
- **A life-income gift** that names the People Inc. Foundation as a remainder beneficiary (*our Charitable Gift Annuity, WNY Coalition Pooled Trust, Charitable Lead Trust*)
- **Your gift of life insurance proceeds or charitable remainder trust**
- **Your gift or assignment of qualified retirement plan assets (via beneficiary designation)**, such as an IRA, Roth IRA, 401K, 403b, TSA, Fixed or Variable Annuity
- **Real property deed or retained life estate arrangement** (transfers ownership of property, but allows you to continue living there)

If you are considering making a legacy gift or have questions about options, contact Christine Mathieu, Legacy officer, at cmathieu@people-inc.org or call 716.817.7256. All inquiries will be confidential.



Shop and Amazon Gives

Shop for Mother's Day, Father's Day and for the warmer months ahead! With AmazonSmile, you can support people with special needs, their families and seniors when 0.5 percent of every purchase is donated to People Inc. To shop at AmazonSmile, go to smile.amazon.com. On your first visit, select People Inc. as the charitable organization to receive donations from eligible purchases before you begin shopping. People Inc.'s direct link is smile.amazon.com/ch/16-0975538. Your selection is saved and then every eligible purchase you make on AmazonSmile will result in a donation. Happy shopping!



Never judge a book by its cover ...

By Beth A. Montague – People Inc. Foundation Charitable Legacy Society Member,
Parent and People Inc. Foundation Board Member

When my daughter was 18-months old, she was diagnosed with a severe speech delay and through the county's Early Intervention Program started speech therapy, her services provided by People Inc.

My daughter worked hard through her pre-school years, but couldn't make it to grade level by kindergarten. One of her pre-school teachers even told us that "she would never be a rocket scientist." Words no parent would ever want to hear whether their child had special needs or not.

As her speech and language skills developed through her school years, she became passionate about all things science. In Middle School, she joined the Science Olympiad team, where she excelled and truly enjoyed herself. Her team advanced to the State Championships, where

she won a medal for her helicopter design. While that may not be "rocket science," my daughter's accomplishment was quite impressive and significant!

It has been my privilege to serve on the People Inc. Foundation Board for the last few years, contributing my time and support to the agency that first stepped in and helped my daughter when she needed it – and to learn of the myriad of ways People Inc. serves the most vulnerable in our community.

When it came time to making a Legacy Gift to the People Inc. Foundation, the decision came very easily for me and my husband. It is our wish that this agency continues to grow and to provide the services they do for families well into the future.

"When it came time to making a Legacy Gift to the People Inc. Foundation, the decision came very easily for me and my husband."

When our daughter started college as a Pre-Med/Neuroscience major (yes, you read that correctly!), she wanted a summer experience that would further her understanding of public health. She spent the last two summers in direct care at group homes working for People Inc., learning about how to care for people with disabilities and severe injuries. People Inc. has been a part of our lives in so many ways, for so many years, and our entire family is grateful for this agency and all the staff for the compassion and care they give to those who need it most.

Museum of disABILITY History

Fundraiser and Auction



SAVE THE DATE

SATURDAY, MAY 19, 2018

3826 Main Street
Buffalo, NY 14226

For more information or interested in attending, email foundation@people-inc.org



1219 North Forest
PO Box 9033
Williamsville, NY 14231-9033

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Volunteer Profile: Allied Mechanical

We welcome our business community to get involved with our agency! We're happy to connect volunteers to activities that best suits their interests. We were fortunate to have a few teams from Allied Mechanical volunteer to paint many rooms in our day programs. Staff and program participants who arrived Monday after their Saturday painting sessions were thrilled with the big difference the fresh paint made in the look and feel of the sites. Thanks Allied Mechanical Team! If you think your organization would like to volunteer for a project or connect with us through a teambuilding event like Dress Down Day, send us an email at foundation@people-inc.org or call 716.817.7400.