

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

Hello to you and hello autumn!

As tough as it is to say goodbye to summer, I do love this time of year. There is something fresh about it, probably linked to memories of starting new classes each fall. And though my garden

has that "spent" look – even picking the last of the vegetables turns into something new – making pickles and spaghetti sauce. It gives me a chance to experiment, be a little creative and leave surprise jars on my friends' porches.

This morning I got a surprise of my own, seeing a pumpkin growing in my front yard by the arborvitaes.... Yep, nowhere near the garden. Then I remembered the "pumpkin snow-angel" I put there last year for the holidays, stacking three pumpkins painted white, with a halo and wings just as a last minute decoration. It's amazing how it took root, and now unexpectedly I have my next pumpkin(s). How great!



In this edition of *Faces of the Foundation*, we focus on the concept of "endowment" – a gift created now, that continues to multiply and produce dividends over time. Through purposeful investing, an endowment gift now results in gifts that continue well in to the future. We know that one

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Message from Legacy Officer – Christine Mathieu



Hello everyone!

Over the past handful of months I have been meeting with professional advisors, members of our board, senior leadership team and existing donors. Through

these conversations it has become clear how important *communication* and *education* are in building awareness around People Inc. as a charitable organization.

When we start talking about People Inc. as a charitable organization, almost everyone has questions – and really good questions! The most popular being ...

"...if I were to name People Inc. in my will, where does my money go and what kinds of things will my money do for the organization for the future?"

If this question happens to be a question of yours as well, before answering you, I would like to know what is important to you and your loved one(s) with special needs. Why do you want to name People Inc. as a benefactor? What are your hopes and intentions for People Inc. for the future?

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Endowment Q & A with the Community Foundation



Andrew Gaerte

Last year, the Board of the People Inc. Foundation made an important investment in the future of our organization, with the creation of the *People Inc. Foundation Endowment Fund* at the Community Foundation for Greater Buffalo. We asked Andrew Gaerte, director, Client Relations of the Community Foundation to share some thoughts about the power of endowment funds.

What is an endowment fund?

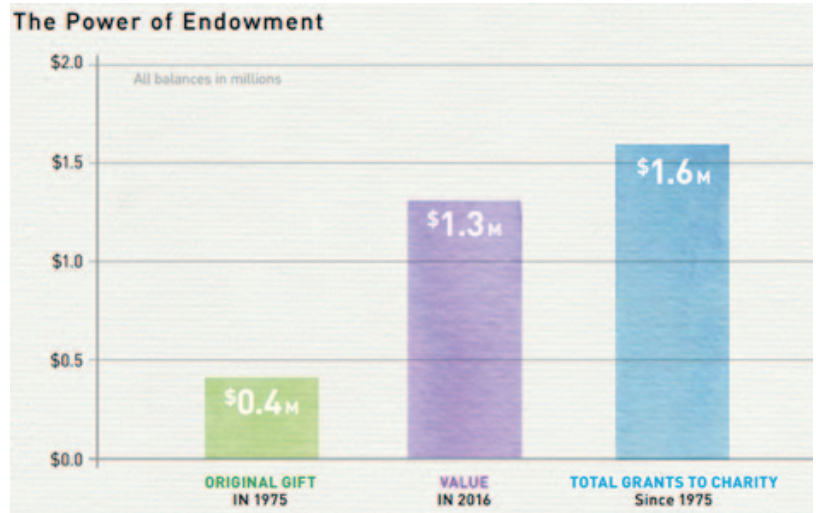
An endowment fund is one in which the original gift remains intact and is invested for long-term growth. Each year, a portion of the earnings generated by the investments in the fund can be used to support the work of People Inc. or reinvested for growth. Over time the endowment fund will continue to grow, while enhancing sustainability for the future.

How does this endowment fund benefit People Inc.?

The creation of the *People Inc. Foundation Endowment Fund* at the Community Foundation reflects the stability, fiscal responsibility, and vision for the future of WNY's largest non-profit organization. Funding generated by the endowment can support a critical program, provide stability for a changing future or be used to make a strategic investment to advance People Inc.'s mission.

Can you give an example of how an endowed gift can grow over time?

At her death in 1975, a widow gifted \$400,000 to the Community Foundation for Greater Buffalo to create an endowed fund as a tribute to her late beloved husband. By the end of 2016 the fund had more than tripled in value to \$1.3 million, all while distributing over \$1.6 million to charitable organizations in her community.



How does this benefit our supporters?

Giving to the *People Inc. Foundation Endowment Fund* (or creating a new endowed fund in support of the People Inc. Foundation) is a wonderful way for people to secure their legacy of generosity. If you love the mission of People Inc. and the work they have done for your loved ones or the community, a gift to an endowment fund is a gift that will grow and support the organization for generations to come.

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Just as everyone's situation is different, our ideas of how we would like to support the organization that cares for our loved one(s) with special needs can be different as well. That's why it's important to engage in conversation and communicate what matters to you with a trusted advisor. From there – we educate.

If this subject hits home for you, be sure to keep reading this newsletter issue! Also, if your calendar is open **October 3, join us for dinner at Illo DiPaolo's for a presentation on "You and Planned Giving."** It will be an opportunity to ask questions and get the answers you need to plan accordingly.

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.

"Message from the Executive Director" from page 1

endowment gift can be added to others, as the seeds that can take care of future needs. Because this is so important, we created a specific *People Inc. Foundation Endowment Fund* invested at the Community Foundation for Greater Buffalo. I've invited Andrew Gaerte, a partner at the Community Foundation, to share some thoughts on the topic on page 2.

This morning's "surprise pumpkin" was a vivid reminder of the power of seeding -- even when *unintentional*, the principles of sowing and reaping are consistent! It got me thinking - Imagine what we could accomplish with *intentional* growth through endowment gifts. As you read through this edition, I invite you to imagine what your endowment gift could do.

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.

Did you know?

The **spirit** of Endowment is *future oriented, stabilizing, and lasting* ... and provides donors and families *peace of mind* knowing that their gift/charitable bequest supports the future existence and continued growth of an organization they care deeply about?

QUICK FACTS:

- Money (gifts) allocated to an endowment is money "tucked away" for the future
- Endowment funds earn interest and that interest compounds and grows the endowment
- An endowment spends interest only, keeping its principal intact and providing for longevity
- You can personalize an endowment by designation ... for example: "The Emily Smith Endowment Fund," where you can provide support and guidance in areas that are most important to you.

For more information about **The People Inc.**

Endowment, contact Denise Bienko at dbienko@people-inc.org or 716.817.7470, or Christine Mathieu at cmathieu@people-inc.org or 716.817.7256.

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, October 3

6 to 8 p.m.

Ilio DiPaolo's Restaurant
3785 South Park Avenue
Blasdell, New York 14219

With our compliments, come join us for dinner and learn what planned giving really is, and why it's of value to you and those you love through group and individual Q&A

Seating is limited. Kindly RSVP by Tuesday, September 26 to Christine Mathieu at cmathieu@people-inc.org or 716.817.7256.

Column: See it or See TO it?

By Denise Bienko, Executive Director

I've learned that we are each motivated to support the mission of People Inc. for a different reason; often an encounter that is very personal and unique. Even our preferences on the giving experience vary. Some of us want to "see" something – some tangible "it" as a result of our giving. Others are more aligned with the mission itself, the overall impact of the organization and satisfaction of investing in its continued impact in the future. Think about your own preferences....In other words, do you want to "see it" – be able to point to something today that was made possible from your gift? Or do you want to "see to it" – that the overall mission continues, that tangible "its" are produced for others in need in the future? And, can you want both?

Marilyn did. I remember meeting her in July of 2000, where we walked through the Summer Garden behind our Brighton Park Day Program. Her recent gift had funded a wheelchair-accessible extension of our greenhouse program. She was thrilled to walk the ramps and see the raised beds, knowing her generosity was allowing so many with mobility impairments to participate in this unique therapeutic experience. She 'saw it.'

We kept in touch, and as she learned more about People Inc., and I learned more about her, something interesting happened. Marilyn started designating her gifts toward our Endowment. Shifting, she became more interested in "seeing to it," that the organization's work continue in the future, than in seeing some tangible result of her giving in the present. When I asked her about it, she said her "perspective broadened." So, she also "saw to it."

Sadly, Marilyn passed away over a year ago. She made a bequest, again designated toward our Endowment, as part of her estate plan. Of course, there is no *right* preference. Marilyn taught me that sometimes our preferences evolve though, and sometimes we do want *both*.



In July 2000, construction was completed on the Summer Garden, a wheelchair accessible extension of the greenhouse program at Brighton Park Day Program. This program offers a unique therapeutic experience for individuals with developmental disabilities, and provides sensory stimulation through planting, tending, and harvesting flowers, vegetables and fruits.



Q: Can I gift my IRA or my required minimum distribution to a charity like People Inc.?

A: Yes you can! A simple gift option that is available is the IRA Charitable Rollover. You, the donor, can make an outright gift (distribution) from your IRA ... and this now permanent part of the law allows individuals age 70 1/2 and older to make direct transfers totaling up to \$100,000 per year to charities without having to count the transfers as income for federal income tax purposes. Donors can count this gift towards their annual required minimum distribution. It's a simple and financially effective way to meet your philanthropic goals.

Source: PC Calc 2017 and www.cof.org/content/analysis-ira-charitable-rollover-extension

**** 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.**

LEGACY SOCIETY MEMBERS

Denise M. Bienko
Howard Benz
James M. Boles
Thomas Ess
Rhonda Frederick
Kathryn F. Gladwell
Donald Gregory
Bonne Hall
David E. Hall
David and Isobel Horvath
James Lembeck

Emma Mahoney
Horace Mann
Marilyn Gohr McTaggart
Beth A. Montague
Nancy Palumbo
Carlton Peter
Robert E. Pope
Robert Ruhlman
George Rogers
Mary Anne Schiesel
Larry and Catherine Skerker

Gary Shoulter
James Swagler
Cynthia Vance
Stanley and Isabel Wadell
Nancy and Donald Ware
Lois Warren
Edward Watts
Mary R. Werdein
Geraldine Werner
Mr. and Mrs. Jeffrey Zimmer

****Special acknowledgement and Welcome to our newest Legacy Society Members ...
Bonne Hall • Beth A. Montague • Cynthia Vance**

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 and pledge your membership for 2018 now. Supporting Members also receive some great (and new!) benefits, including:

Member Packet:

- Entertainment card featuring more than 365,000 places to save
- People Inc. Foundation Calendar
- Certificate of appreciation

Other Benefits:

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



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, please complete and return the enclosed envelope.



Our Drive Fore Disabilities Golf Tournament

SOOO Close! Thank you Mike Licata, and all of the golfers who came out to play in the People Inc. Foundation 16th Annual Drive Fore Disabilities and Auction this August. Mike was just inches away from a hole in one, and a \$10,000 cash prize – his face says it all, doesn't it? We won't count him out though, knowing we'll see this loyal supporter again next year!

Special thanks to our Premier *Hole in One* Sponsors and *Eagle* Sponsors.

Hole-in-One Sponsors



Eagle Sponsors



CSI CONTRACT SPECIALISTS

Thanks to supporters, our event raised more than \$104,000! Our next tournament is scheduled for Monday, August 20, 2018. If interested in more information, contact Jennifer Robinson, advancement office and database manager at jrobinson@people-inc.org or at 716.817.7269.





Volunteer Profile: Thank you KeyBank Team!

We welcome friends and our business community to get involved with our agency! We are happy to connect volunteers to activities that best suits their interests. A team from KeyBank helped with garden cleanup at our day program in South Buffalo this summer. For more information, contact foundation@people-inc.org or call 716.817.7400.

Charitable Legacy Society

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, call Christine Mathieu, legacy officer, 716.817.7256, or email cmathieu@people-inc.org. All inquiries will be confidential.



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You use the same account on Amazon.com and AmazonSmile; your shopping cart, Wish List, wedding or baby registry, and other account settings are also the same. To shop at AmazonSmile simply go to smile.amazon.com. **On your first visit, you need to select People Inc. as the charitable organization** to receive donations from eligible purchases before you begin shopping. People Inc.'s direct link is (<https://smile.amazon.com/ch/16-0975538>). Your selection is saved, and then every eligible purchase you make on AmazonSmile will result in a donation. Let's start shopping!

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Please email foundation@people-inc.org, and in the subject line write: *Add me to mailing list.*

Thank you for your support!