

SECURE

AUTUMN 2018 | ISSUE 10
INVESTING IN THE FUTURE

SECURE® is a planned giving newsletter published semi-annually by The Arc of the United States.



From Passion to Action: Leaving a Better World Through a Planned Gift

In our lives, we often find causes that compel us to

act and take steps to leave a legacy for a better and more equitable world after we're gone.

Such is the case for John Lewis, who happened upon The Arc unexpectedly during a career in finance. With the help of a financial advisor — and aided by his own expertise and passion for disability rights — John found ways to ensure the stability of The Arc for years to come.

John Lewis first got involved with The Arc when he was working for the Developmental Disabilities Planning Council which provided funding for The Arc of Tennessee. From there, John became more involved with the mission and organization, serving on The Arc of Tennessee Board of Directors as Treasurer, Vice President, President, Past President, and Secretary. His support and commitment was formally recognized this year, as he was awarded the 2018 Roger Blue Lifetime Achievement Award — The Arc of Tennessee's highest honor.

On the national level, John is a long-time supporter, serving on The Arc's Board Development Committee.

He was also one of our most ardent supporters when The Arc made the decision to establish a planned giving program and workgroup, of which The Arc of Tennessee is a member. But John's desire to ensure a strong future for The Arc and people with intellectual and developmental disabilities (I/DD) doesn't end there.

John has committed to making a planned gift to ensure the sustainability of The Arc's work after he's gone. When asked why he believes that The Arc is a great choice for planned giving, he states: *"The advocacy that The Arc does, particularly now with the current political climate, is more critical than ever."*

He knows The Arc's advocacy and initiatives are crucial to promoting and protecting the lives of individuals with I/DD. His many years of leadership and service for the Developmental Disabilities Planning Council, the Department of Intellectual Disabilities, The Arc of Tennessee, and The Arc's national office have proven to him why ensuring the sustainability of the organization on all levels — local, state, and national — is vital.

Making a planned gift is, in John's words, the "logical way" to ensure that The Arc will be strong for generations to come. As a diligent leader, John takes pride in ensuring the sustainability of The Arc — especially now as essential supports and services are under attack.



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Completing the Puzzle

Putting the financial pieces of your life together

By Michael Shore, Esq.

Much like a jigsaw puzzle, solid financial plans and estate plans include many interlocking components — a will, healthcare proxies, powers of attorney, retirement plans and life insurance, not to mention trusts that aim to accomplish both lifestyle and legacy goals. Accountants, financial planners, investment advisors, and attorneys are all valuable allies in the process of framing and memorializing your wishes; you will likely be well served if certain advisors have the clear, additional responsibility of ensuring that all of the pieces of the plan fit together.

A well-coordinated plan is of particular importance when one of the beneficiaries of an estate plan has intellectual or developmental disabilities. Your plan will need to maneuver through the maze of federal and state programs that are available to those impacted by such disabilities, to ensure that your loved one's eligibility for those governmental benefits is preserved.

In addition to helping you provide for your family's needs, your team can also help you incorporate provisions into your plan that benefit charities such as The Arc that may align with your family's values — for example, you can make The Arc or other worthy organizations beneficiaries of your investment accounts, retirement funds or insurance. Many other steps can help you pursue philanthropic and family financial goals at the same time, such as establishing a charitable remainder trust, donating low-basis stock in an effort to mitigate your capital gains tax obligations, or reducing income tax liability by directing required minimum IRA distributions to a charity.

These and many other tools are available to you, and with the help of an experienced team of advisors, you can take advantage of many opportunities to impact the work of organizations such as The Arc, while also helping to ensure your family's future.

For more information about how you can leave a lasting legacy and support The Arc, please contact The Arc's Development Department at plannedgiving@thearc.org or 202.534.3713.

Michael Shore (mshore@brownadvisory.com) is a strategic advisor at Brown Advisory, where he provides guidance and support to individuals and families on trust and estate planning, tax planning, and many other investment and financial matters.

John's background in finance gave him the knowledge to organize his planned gift. For individuals who aren't as familiar with planned giving options, he suggests that speaking to a financial advisor is a great first step. John says that his advisor was extremely helpful throughout his process of setting up his future plans, especially during a time of change in his life when his partner passed away. During this difficult time, John was able to trust in his advisor to suggest changes to his financial plans and find the most efficient ways to ensure his bequest supports The Arc and its advocacy for years to come.

Times of change in our lives can spark the opportunity to consolidate and organize plans, and a financial advisor can be there for you to ensure a smooth planning and transition process.

For more information about how to leave your legacy through a planned gift like John, please contact The Arc's Development Department at plannedgiving@thearc.org or 202.534.3713.

The Arc's Future Planning Resources



For more than 65 years, The Arc has been supporting individuals with I/DD and their families. In 2014, The Arc launched the Center for Future Planning® to support and encourage adults with I/DD and their families to plan for the future. The Center provides reliable information and offers assistance on areas such as person-centered planning, decision-making, housing options, and financial planning.



To better support families, The Arc offers Build Your Plan®, which is a free online tool that enables families to create accounts and begin to build their plans within the Center. Resources and advisors — including staff from the Center — are ready and willing to help you prepare for the road ahead. There's no time like the present to start building a stable and bright future for your loved ones!

Visit futureplanning.thearc.org to learn more.

For more information about making a planned gift to The Arc, please contact The Arc's Development Department at plannedgiving@thearc.org or 202.534.3713.

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*For people with intellectual
and developmental disabilities*

1825 K Street, NW
Suite 1200
Washington, D.C. 20006
800.433.5255
thearc.org



For people with intellectual and developmental disabilities

1825 K Street, NW, Suite 1200
Washington, D.C. 20006

thearc.org

Autumn 2018, Issue 10

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