

# INVESTING IN OUR WORK

## Options and Tax Advantages



### TAXES CHANGES - CARES ACT

In 2020, new tax incentives were passed as part of the CARES act, giving donors who take the standard deduction the option to claim an **above-the-line deduction** of up to **\$300** for cash contributions.

Donors who itemize their deductions can claim up to **100%** of their **Adjusted Gross Income** (increased from 60%).

### STOCK GIFTS

Gifts of stock to Senior PharmAssist are sold immediately by the Orchid Group at Morgan Stanley, which generously waives all fees. Stock gifts are **not subject to capital gains tax**.

### IRA ROLLOVER

If you are over 72 years old, and have an **IRA**, a Qualified Charitable Distribution (QCD) can count toward your annual Required Minimum Distribution (RMD) and is **not subject to income taxes** (up to \$100k).

### PLANNED GIVING

There are several options for planned giving - please consult your tax adviser about the benefits of donating a Health Savings Account (**HSA**), setting up a **Charitable Remainder Trust**, **Charitable Lead Trust**, or adding Senior PharmAssist as a beneficiary to an **insurance policy or retirement account**.

Also, several generous supporters have let us know that Senior PharmAssist will be included in their will or living trust (see reverse). **We invite you to join** this group of investors in our work.

### PROPERTY

We are also equipped to accept **gifts of property**, including vehicles, land, and more!

## THE STEWARDSHIP FUND

In 2012, planning for the future, Senior PharmAssist started **The Stewardship Fund**.

Our goal is to grow this fund to **\$1.4 Million** by 2021, when our largest private funder will close their doors.

Contributors who give or pledge over \$5,000 to this Fund join the **Legacy Society** (see reverse).

Gifts of any size are a meaningful investment in our work, however, we ask that Stewardship Fund gifts be above and beyond your support of our operating budget.

# THE LEGACY SOCIETY

Investors who have contributed/pledged  
\$5,000 or more to the Stewardship Fund

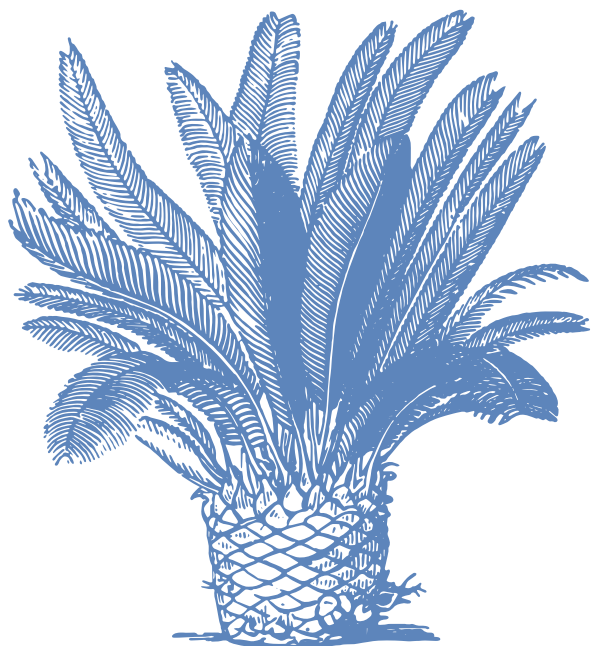


Anonymous  
Ariel Foundation  
John and Sandra Atkins  
Shirley Few  
Kay and Wade Gresham  
Thomas Krakauer  
Peg Lewis  
Ruth Mary & Horst Meyer  
Ann Carole Moylan

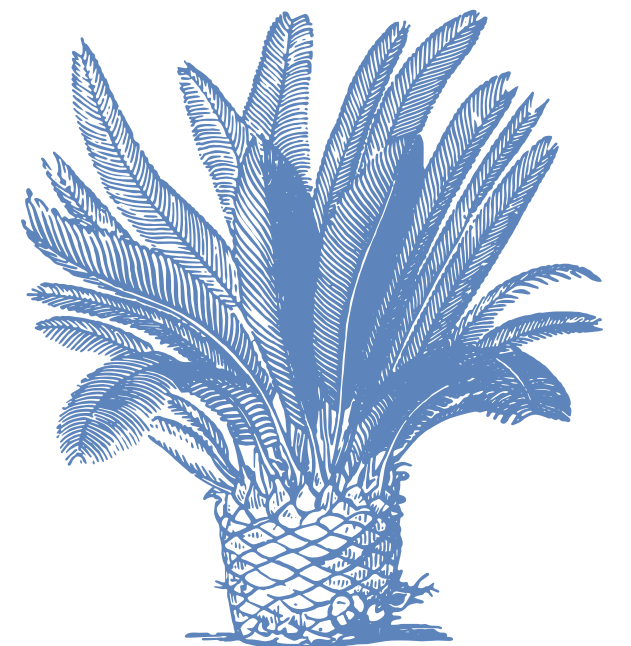
Frances Rollins  
Marie & David Sappenfield  
John Stelling & Victoria Herring  
Perry Sloan  
Woody & Marty Warburton  
Karen & Mark Webbink  
John Weeks  
Chuck and Jean Wilson

## BEQUESTS - PAST AND FUTURE

Individuals who have included us in  
their wills or living trusts



Anonymous  
Becky Bowden  
Dan Hudgins and Ann McKown  
Margaret Keller  
Victor B. Moore, Jr. Family Charitable Remainder Trust  
Evelyn D. Schmidt  
John Stelling & Victoria Herring  
Gina Upchurch



## NEXT STEPS

### CONTACT US

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### STOCK GIFTS

To arrange a stock gift, contact Sean Fenton at Morgan  
Stanley's Orchid Group at 919-490-7113 or  
sean.p.fenton@morganstanley.com