

Sustaining UCP
of Greater Cleveland's
future while
enhancing
the lives of those
we serve.



RECOGNITION:

UCP of Greater Cleveland is extremely grateful for the generosity of its many benefactors. To show our appreciation, we welcome the opportunity to recognize each and every contributor, or, if you wish, preserve your anonymity.

This brochure highlights just a sample of the many planned giving options available to you. We encourage you to discuss these options with your financial advisor. If you do not have a financial advisor or for additional planned giving assistance, please reference the list of Estate Planning professionals below.

McDonald Hopkins

Michael Riley
216-348-5454
mriley@mcdonaldhopkins.com

Schneider Smeltz Spieth Bell LLP

David Lenz
216-696-4200
dlenz@sssb-law.com

Taft/

Missia H. Vaselaney
216-706-3956
mvaselaney@taftlaw.com

For more information about UCP of Greater Cleveland or to initiate a conversation about planned giving to our organization, please contact:

Trish Otter, President & CEO

216-791-8363 ext. 1275
totter@ucpcleveland.org

Amy Dwyer-Shute, Development Advisor

216-791-8363 ext. 1282
adwyer-shute@ucpcleveland.org

Tammy Willet, Director of Development

216-791-8363 ext. 1228
twillet@ucpcleveland.org

Thank you for your interest in supporting UCP of Greater Cleveland. Our Mission is to empower children and adults with disabilities to advance their independence, productivity and inclusion in the community. UCP of Greater Cleveland was founded in 1950 and is a leader in disability services in Northeast Ohio. Each year, we serve over 1,000 individuals with a wide variety of disabilities through expert pediatric therapy, family supports, employment opportunities and community inclusion activities.



UCP of Greater Cleveland
10011 Euclid Avenue
Cleveland, Ohio 44106
www.ucpcleveland.org



PLANNED
giving
OPPORTUNITIES





For more than 65 years, UCP of Greater Cleveland has been providing best practice pediatric therapy and family supports to children and diverse workforce readiness training, employment placement and meaningful community engagement activities to adults. We annually embrace over 500 children and empower over 500 adults providing exceptional programs, services and supports to infants through senior adults with disabilities that enrich their daily lives and provide seamless pathways toward individual empowerment and greater independence.

Our philanthropic partners' generosity makes our work possible. As we look to the future, we are committed to building our endowment fund to further our ability to serve our clients as a premier provider of disability services for many years to come. Your Endowment Campaign gift will support essential program components strategically implemented to meet emerging client needs and prepare for anticipated client growth, including:

Expanding Community Integration and Employment Opportunities for Adults with Disabilities

- Ohio's Employment First Initiative requires restructuring of our OakLeaf Center of Excellence for Adults requiring community employment as the first option for individuals with mild-moderate disabilities and community integration for individuals with the most significant disabilities.
- Employment First also requires a phase out of segregated facility-based workshops. Our workshop will transition into a best practice workforce readiness training facility.

Increasing Clinic-based Youth and School Outreach Therapy Offerings

- Our LeafBridge Center of Excellence for Children will expand our best practice physical, occupational and speech-language therapy school outreach services.
- Our Director of LeafBridge Services will be developing specialized clinics to meet the emerging needs of our youth clients.

Building Organizational Capacity to Support Sustained Growth

- Core to our mission is to provide therapy to any child in need regardless of their family's ability to pay for services. This significant charity care burden necessitates sustained fundraising growth.
- Continued explosive growth in our OakLeaf Center of Excellence's employment and community integration services requires increased staff capacity and professional development training.
- UCP's Assistive Technology Services (AT) improves our clients' functional ability to access the world around them. There is an urgent need for additional state-of-the-art AT equipment to better assess and serve our clients.

I invite you to join our Board of Directors and staff leadership in making a planned gift to UCP of Greater Cleveland to build our Endowment Fund as an essential step toward sustaining and furthering our mission to empower children and adults with disabilities to advance their independence, productivity, and inclusion in the community.

My colleagues and I look forward to discussing with you the many available gift planning options that will help you meet your financial and charitable goals.

Best regards,

Patricia S. Otter, President & CEO

Planning Your Gift

Gift planning with UCP of Greater Cleveland is a creative process that adapts to the changing philanthropic needs and wishes of our supporters. Successful gift planning allows you to make charitable contributions in ways that maximize personal, family and philanthropic goals. A range of charitable giving options can be tailored to meet your needs, and can include benefits such as guaranteed lifetime income for you and/or your loved ones or savings on capital gains, income gifts and estate taxes.

What to Give

Philanthropy should not be complicated, nor should it require great wealth. When you give to UCP of Greater Cleveland, your gift should be simple to make. You choose what to give, how to give, and how your gift will be used. Your gift will ensure that UCP of Greater Cleveland can continue to advance its mission to empower children and adults with disabilities to advance their independence, productivity and inclusion in the community for generations to come.

A variety of options are available to achieve your financial and philanthropic goals. You can choose a testamentary gift (which will occur after your lifetime), a deferred gift (a gift which will happen at a future date set by you) or a life income gift (a type of gift that will pay you and/or your spouse an income for life).

Assets you can use to make a gift:

- Cash/Check
- Stocks, Bonds, Mutual Funds
- Real Estate
- Tangible Personal Property of Value (art, jewelry)
- Life Insurance Policy
- Retirement Plan Assets and/or IRAs
- Business and/or Partnership Interests

Ways to Give

BEQUESTS

After you have provided for your family and loved ones, a bequest would enable you to offer a gift of support to UCP of Greater Cleveland. An example of language that you could use is, "I give and bequeath to United Cerebral Palsy Association of Greater Cleveland, Inc. (the sum of \$____ or ____%) to support its exempt purposes (or insert name of program)."

LIFE INSURANCE

You can make a gift to UCP of Greater Cleveland of your paid-up life insurance policy or you could purchase a new policy and name UCP of Greater Cleveland as the owner and beneficiary. With a gift of a paid-up life insurance policy, you can deduct the cash value of the policy at the time of the gift. With the purchase of a new policy, you would establish the policy and then transfer the ownership to UCP of Greater Cleveland. If there are premium payments that remain to be paid, you could make annual gifts to UCP of Greater Cleveland to help cover the cost of the premium, which would also be tax-deductible to you.

RETIREMENT PLAN ASSETS

As with a life insurance gift, naming UCP of Greater Cleveland as a beneficiary designation can offer you significant value. Due to applicable estate and income taxes, family members usually only receive 25 to 30 percent of the value of an IRA or retirement plan. Much of this tax can be avoided if the assets are instead used to fund a bequest to UCP of Greater Cleveland.

DEFERRED OR LIFE INCOME GIFTS

Gift Annuity

A charitable gift annuity (CGA) is a simple agreement in which we promise to pay you, or you and your spouse, a lifetime income in exchange for a gift of an asset. The payment is fixed at the time you establish the gift and can be paid to you in monthly, quarterly, semi-annual or annual payments.

Charitable Remainder Trusts

A charitable remainder trust (CRT) is generally used when there are multiple beneficiaries. A CRT can provide income to you, you and your spouse, or your spouse and your children for life or for a term of years, in exchange for a gift. The payment can be fixed (annuity trust) or variable, based on the year-end market value of the trust (unitrust).

Retained Life Estate

A retained life estate is a gift plan that allows you to donate a home to UCP of Greater Cleveland while retaining the right to live in the home for the rest of your life. A gift to UCP of Greater Cleveland of the remainder interest in a personal residence provides you with a current charitable deduction and may allow reduction or elimination of capital gains tax on the property's appreciation. You retain the right to live on the property, but continue to be responsible for all routine expenses, maintenance fees, insurance, property taxes, repairs, etc.

