



FOUNDATION OF DANE COUNTY, INC.

901 POST ROAD ■ MADISON, WISCONSIN 53713-3260
(608) 223-9110 FAX 223-9112

Supporting the
Madison Area
Rehabilitation Centers'
Employment and
Education Services
for Adults with
Developmental
Disabilities.

An Invitation to Build a Better Community

You are invited to join the MARC family and help us enhance our mission of caring and service.

Direct donations

You can simply write a check to MARC Inc. or the MARC Foundation of Dane County. We will provide a letter that you can use for your tax purposes.

You can also donate with your credit card by doing so online at www.marc-inc.org



Corporate Giving

We are fortunate to have a number of Dane County businesses providing financial and professional support in the form of underwriting, donation of services, and expertise. We greatly appreciate their support. As we grow at MARC, our mission will broaden and there will be new opportunities for businesses and MARC to work together for the community good.

In-Kind Donations

Many individuals and businesses choose to make in-kind gifts or donate professional services. This enables us to direct more of our resources toward fulfilling our mission.

Gifts by Bequest

A bequest can be made through your will or trust and is the easiest way to make a planned gift. It can be in the form of a specific amount, percentage, or residue and can be made in honor or memory of a loved one. Using this method, you keep control of the assets during your lifetime and make the gift upon death. These gifts will support the future mission of MARC.

To leave a charitable gift in your will or revocable living trust, you simply include a clause that directs a gift be made to the Madison Area Rehabilitation Centers, Inc. or the MARC Foundation of Dane County. You can leave a specific dollar amount, a set percentage of your estate, or the remainder of your estate.

If you already have a will, you can add a charitable bequest with a supplement, called a codicil. Or, if it's time to update your will, you can include a gift to MARC in your updated will.

You can make a general bequest to help provide for the most critical needs at the time the money is received, which is the most beneficial to MARC. Or you can make a bequest to provide a gift to a specific program. With an endowment fund, your gift is invested so you can provide a permanent annual source of income for MARC into the future.

Here are some examples of how you may create a charitable bequest:

General bequest:

- I give \$_____ (or _____ % of my residuary estate) to the Madison Area Rehabilitation Centers.

Gift to a specific program or area of interest:

- I give \$_____ (or _____ % of my residuary estate) to Madison Area Rehabilitation Centers to support _____.

Designated bequest to establish a new endowment fund:

- I give \$___ (or __% of my residuary estate) to the MARC Foundation of Dane County to establish an endowment fund for MARC, Inc., to support _____.

How to name MARC in your will

It is important to schedule a meeting with your attorney and add the correct legal language to your document when updating your will.

If you wish to name MARC or the MARC Foundation in your will or estate plan, we should be named as:

Madison Area Rehabilitation Centers, Inc., a nonprofit corporation, organized and existing under the laws of Wisconsin, with principal business address of 901 Post. Rd., Madison, WI 53713.
Our tax identification number is: 39-0968930

Or...

MARC Foundation of Dane County, a nonprofit corporation, organized and existing under the laws of Wisconsin, with principal business address of 901 Post. Rd., Madison, WI 53713.
Our tax identification number is: 39-1660939

Gifts of Stock

By making a gift of stock you can deduct the current fair market value as a charitable gift, avoid the capital gains tax on the appreciation, and provide support to MARC at the same time. As with a gift of cash, a gift of stock can be unrestricted or used to establish a life income arrangement such as a charitable gift annuity or charitable remainder trust.

Charitable Gift Annuities

A gift annuity is an agreement whereby the donor transfers assets, such as cash or appreciated

securities, to MARC (via the Madison Community Foundation). In return, the donor receives a guaranteed payment for the rest of the donor's life. Gift annuities, which are income-producing gifts, are popular with donors because they receive a charitable income tax deduction, possible estate tax savings, a fixed payment for life, some tax-free income for a period of time, and possible capital gains tax savings.

You can also make a gift now and defer having payments made to you until a future date. This type of gift is called a deferred gift annuity. The rates are generally higher than the rates on current gift annuities depending upon the annuitant's age and the length of the deferral.

Retirement Plans and Life Insurance

Did you know that you can set aside even a part of your 401(k) or life insurance policy as a gift to the MARC Inc. or the MARC Foundation? It's very easy to do. Here's how:

- Ask your fund manager or human resources department for the beneficiary form.
- You name MARC as a beneficiary of all or part of your 401(k), life insurance policy or other qualified account.
- You return the form to your fund manager or Human Resources department, and then we hope you will let us know about your gift.
- If you are naming us as a beneficiary of your 401(k), there may be an additional step. Please contact us for details.

Benefits to your giving spirit:

- You can escape both income *and* estate tax levied on the residue left in your retirement account by leaving it to MARC.
- Give the most-taxed asset in your estate to MARC, and leave more favorably taxed property to your heirs.
- You can continue to take withdrawals during your lifetime.
- You can change the beneficiary if your circumstances change.

For more information or to have a confidential discussion about which option is best for your situation, please call:

Gary Johnson, Accounting Manager 608-223-9110 x 15 gjohnson@marc-inc.org

Michael Steinhauer, Director Job and Fund Development

608-223-9110 x 36 msteinhauer@marc-inc.org.

THANK YOU!

