

# Ways to Donate

## **ANNUAL FUND**

By giving to the Annual Fund, you provide a valuable source of funding that impacts every aspect of our mission. Annual Fund gifts support a broad range of programs, facility enhancements and new technology for the benefit of our patients.

## **MONTHLY GIVING PROGRAM**

Donors who chose our monthly giving program understand the need for ongoing, consistent financial support. Your monthly gift will have a direct impact on our patients and will provide a dependable source of income to help us carry out our mission. The Monthly Giving Program is a cost-effective, time efficient, and eco-friendly way to give to Carrier Clinic. And because this is such an effective way to donate, more of your donation goes into the important programs here at Carrier Clinic. Each month your contribution will automatically be charged to your credit card. It's safe and convenient. By selecting the Monthly Giving Program you help Carrier Clinic plan for the future, because we know we can count on your generous donation to help support the important work we are doing here at Carrier Clinic.

## **GIVING AS A TRIBUTE** (*Gifts "In Memory of" or "In Honor of" someone special*)

Remember someone special in a way that means so much to so many. Whether you are giving a donation in honor of or in memory of a special person, perhaps a patient, family member, friend or dedicated physician or nurse, a donation made in someone's name is a unique way to honor, remember or thank a special person in your life. To make a donation in honor of or in memory of someone special select the appropriate box in the donation form.

## **CORPORATE SUPPORT**

Corporate Sponsorship allows your company to enhance your corporate image, while letting your employees and the community know that services supporting mental health for families in their greatest hour of need are important to your company. By supporting Carrier Clinic with a corporate sponsorship for an event or by taking part in the Capital Campaign, your corporate name and image will be linked to the important work being done for our patients and their families. In addition to special events, the Carrier Clinic Capital Campaign offers many naming opportunities. Call the Carrier Clinic Development office at 908-281-1495 to further discuss a cause related marketing sponsorship that makes sense for your company.

Employee involvement enables your employees to support the important work being done at Carrier Clinic while building camaraderie and a spirit of team work. Call the Development office at 908-281-1495 or email [dzaleski@carrierclinic.com](mailto:dzaleski@carrierclinic.com) for help in planning a fundraiser at your location. It's fun and easy!

## CAPITAL GIFTS

Carrier Clinic has offered hope, help and healing for 100 years. Our goal is to continue to offer first rate mental health care and services to the community, for every person in need of our support. We can only hope to continue this important work if we can expand and meet the growing need for our services. By giving a Capital Gift you help to ensure that the facilities necessary to carry out our mission are state of the art and available to those in need.

## Planned Giving—Your Legacy

You can help Carrier Clinic continue our work well into the future by thinking of Carrier Clinic today through bequests, gift annuities, gifts of real estate, trusts, and other tax-saving methods of support. It is possible to secure the future for your family and arrange your financial affairs, while also making a lasting contribution to Carrier Clinic. Planned Giving is a creative approach to charitable giving that could offer significant tax and income benefits, while also giving you peace of mind. Planned Giving, your way to ensure a legacy lives on.

There are many ways to include a charitable organization in your estate planning that will produce tax-saving benefits, fulfill your philanthropic goals and directly benefit the community.

### *For example:*

- **Simple Bequest** - When creating or revising a will, many individuals plan to leave gifts, or bequests, to charitable institutions such as Carrier Clinic.
- **Charitable Gift Annuity** - With this agreement, the donor makes a single payment to Carrier Clinic, and in return the donor and/or named beneficiary receives a fixed dollar amount each year for life.
- **Charitable Remainder Trust** - This trust enables a donor to set aside assets now for the future benefit of Carrier Clinic, while reserving an income stream for him or her self for a pre-determined period of time or lifetime(s). When that period expires, the trust principal is transferred to Carrier Clinic.
- **Charitable Lead Trust** - A donor can transfer assets to this trust, which will provide income payments for a period of years to Carrier Clinic. At the end of the payment term, the principle reverts to the donor and/or beneficiary.

Please note that the above mentioned ideas for creating your personal philanthropic legacy in support of Carrier Clinic are not intended to serve as legal or financial planning advice. All Planned Giving donations should be discussed and arranged with an attorney and/or a certified financial planner.

## GIFTS OF STOCKS AND INSURANCE

Gifts of stocks, bonds, and mutual funds can offer a donor an advantageous way to support Carrier Clinic and making a donation of this type is an easy process. Please contact your broker or attorney to guide you through the necessary steps.

### **GIFT OF LIFE INSURANCE**

A life insurance policy that is no longer needed can become a valuable donation to benefit the work being done at Carrier Clinic. A policy donated today could mean a tax receipt for the current cash value of the policy. Contact your insurance broker or attorney to discuss this giving option.