



Your New Year's Planning Resolution



It's almost 2025! It's a great time to make a New Year's resolution to get your plans updated and in order.

Special Olympics is happy to offer our supporters a free lifetime account through Giving Docs, so you can plan for the future from the privacy and comfort of your home.

With Giving Docs' comprehensive suite of tools, you can create or update your will and draft other important documents, like medical directives and powers of attorney. You'll also be able to include a gift to Special Olympics and/or your local Special Olympics affiliate (but you are never obligated to). It is free, confidential, and legally valid in all 50 states and the District of Columbia.

To access your complimentary account as well as our other planning resources, visit specialolympics.org/givingdocs.



Tax-Smart Giving from your IRA: Extend Your Generosity

Act before December 31 to maximize your charitable giving and lower your 2024 income tax burden with a qualified charitable distribution/IRA rollover.

If you are age 70.5 or older, you can transfer funds from your IRA directly to Special Olympics. This is an effective way to have an immediate impact on creating a world of acceptance and inclusion.

You may give up to \$105,000 (\$210,000 for spouses) per year to all charities. You may also be able to take a one-time distribution of \$53,000 to fund a charitable gift annuity.

Your gift is a transfer of funds from your IRA to Special Olympics, so while you do not receive a charitable deduction, it does not create taxable income for you. The transfer of funds can count toward your annual required minimum distribution from your IRA.

Your gift must be sent directly from your IRA administrator to Special Olympics. Learn more at specialolympics.org/QCD.

At Your Service

If you have included a gift in your will or trust, or have named Special Olympics as a beneficiary of your retirement plan, life insurance, or other account, please let us know. We would be privileged to thank you and welcome you to The Champion's Society®.

Special Olympics Office of Planned Giving



Connie Grandmason
Senior Director of Planned Giving
866-690-3951



Sara Deur
Senior Manager of Planned Giving
202-964-2498

plannedgiving@specialolympics.org

When creating a gift to Special Olympics in your will, trust, or via beneficiary designation, you have option to include your local chapter affiliate, national office, or both.

Legal name: Special Olympics, Inc.

Address: 2600 Virginia Ave NW, 11th Floor
Washington, DC 20037

Federal Tax ID Number: 52-0889518

Want to include a gift to your local Special Olympics chapter affiliate? Please contact our Office of Planned Giving and our friendly staff will be happy to provide your chapter's legal name and tax ID number.



Visit specialolympics.org/plans for our library of free planning resources!

SMART PLANNING

FOR FRIENDS OF SPECIAL OLYMPICS



Fall 2024

The Champion's Society® Member Gary Borla

Reflecting on Four Decades as a Special Olympics Volunteer



I'd like to share why I have supported Special Olympics for so many years and why I became a member of The Champion's Society® by including a gift in my estate plan. Perhaps my story will encourage others to join me!

I've been volunteering with Special Olympics Connecticut for over 40 years now. It started back in 1982 when two coworkers told me excitedly about their experiences volunteering at the Summer Games. Their positive enthusiasm drew me in, and I just had to see it for myself.

That first experience driving into the venue is etched in my memory. The bright sunny day, the smiles everywhere I looked—from athletes to volunteers to spectators. I remember thinking, "What a wonderful setting. It feels good to be here!" I registered as a volunteer and was welcomed warmly by others also donating their time. I could tell right away this was a **special** community.

The day flew by, and I made my commitment to keep coming back and support these amazing people for as long as I could.

Since then, I've volunteered at countless Summer and Winter Games. I even became a certified cycling official! Officiating was such a thrill, especially seeing over 7,000 athletes from 143 countries come together in competition and unity. I soaked it all in—

from cycling to equestrian to swimming. The closing ceremonies were bittersweet, but the joy lingered on.

My employer also became a sponsor, and I'm grateful for coworkers, friends, and family who volunteer behind the scenes to make the Games run smoothly. The leadership keeps me inspired too—seeing everyone working just as hard to ensure a terrific event day.

Special Olympics teaches that anything is possible if you set your mind to it. I've witnessed athletes overcome challenges that once seemed insurmountable, all thanks to the compassion of coaches and volunteers. The "tiny ripple of hope" that the late Robert F. Kennedy spoke of—that's what Special Olympics is all about. After 41 years, I'm still in awe of this community and all it represents.

I hope to keep supporting for many years to come, and I know that the gift in my estate plan will help athletes beyond my lifetime.

INSIDE:

- Meet Sargent Shriver Global Messenger Margaret Turley
- Tax-Smart Gifts to Make in 2024
- Update Your Plans in 2025

Meet Sargent Shriver Global Messenger Margaret Turley

For 20 years Special Olympics athlete leaders have served as Sargent Shriver Global Messengers (SSGMs). These spokespeople for the movement lead the campaign for a more inclusive world for people with intellectual disabilities. Through their participation and leadership at global, regional, and local events, they challenge the mindsets of political leaders, policy makers, educators, employers, and society. In January 2024, Margaret Turley, from Kilkenny, Ireland, was chosen as one of 10 Messengers for the period 2024 to 2027.

I discovered the exciting news when the Special Olympics Ireland team played a video from Tim Shriver where he made the announcement that I had been chosen as a Sargent Shriver Global Messenger.

I went through a roller coaster of emotions. At first, I was shocked. I couldn't believe that I had been selected. Then I was emotional but very happy and excited to take on this new challenge.

I have been involved in Special Olympics since 2015. I have made friends for life and been provided with leadership opportunities through

my role as a Health Messenger and Athlete Leader. These opportunities have increased my confidence and ability to advocate for myself and others.

My brother and sister have been my primary role models. Just as they did, I worked hard studying at Trinity College in Dublin, and I learned how to drive a car and passed my driving test! I have not looked back. Now I am still achieving both in my work and in Special Olympics.

I look forward to bringing ideas and initiatives from my fellow athletes to the international stage and making a positive change for my peers.

Project ALL STAR: Leveling the Health Access Playing Field

People with intellectual disabilities face significant health disparities and challenges in accessing quality health care. Project ALL STAR identifies the barriers preventing people from accessing health care and determines ways to overcome them so that every person with intellectual disabilities can live a fulfilling and healthy life.

ALL STAR stands for "Active Life and Longevity: Special Olympics Transforming Athlete Results."

Project ALL STAR aims to understand how Special Olympics programs improve athletes' lives. It studies their health and

well-being over time and seeks to identify lasting impacts on their physical, social-emotional, and mental health.

Special Olympics athletes will be directly involved in Project ALL STAR as co-researchers. The principle of "Nothing About Us Without Us" is the basis for this model.

Our athletes' participation allows them to provide feedback as co-researchers and advisors on the research process while ensuring their perspectives and their own lived experiences are reflected in the research and recommendations.



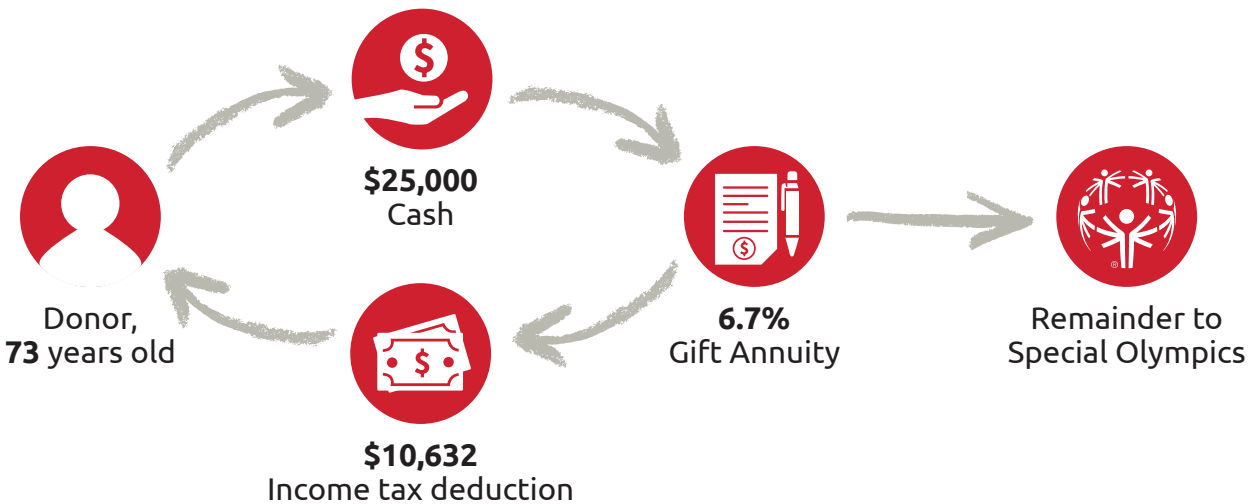
A Gift that Gives Back While Supporting Athletes of the Future: Charitable Gift Annuities

If you are committed to a future where every person with intellectual disabilities can achieve their potential and thrive, you may want to consider a very special way of giving—a charitable gift annuity.

- You donate cash or securities worth \$10,000 or more to Special Olympics and receive payments for life in return. Your gift will be used to support Special Olympics' athletes of the future.
- Your payment rate is based on your age and will never change, no matter how long you live or how the market fluctuates. Payments must start at age 65 or later.
- You can fund your annuity with appreciated securities, and you may avoid capital gains tax.
- Gift annuities can benefit up to two people, making them an ideal way to provide financial security for a spouse or other loved one.
- Payment rates have increased recently, making this a great time to consider a charitable gift annuity.

A New Way to Fund a One-Time Charitable Gift Annuity

Supporters aged 70.5 or older may take a one-time qualified charitable distribution (QCD) from their IRA to fund a charitable gift annuity. There are a few differences between annuities funded with a QCD and those funded with cash or appreciated securities. Please contact us to learn more about this opportunity.



Don't Forget to Update Your Beneficiary Designations!

When updating their plans, many people forget about their beneficiary designations. It's crucial to review and update your beneficiaries on your retirement plan, life insurance, and other financial accounts. With Giving Docs, you can find assistance with updating your forms, or you may be able to log on to your online accounts and update your beneficiaries.

Naming Special Olympics as a beneficiary is a wonderful way to create your own legacy of inclusion.

