

# Create Your Legacy of Inclusion



**Special  
Olympics**







## Create Your Legacy of Inclusion

Throughout our lives, there are moments when we pause to reflect on what we have achieved and what we hope to accomplish. We consider how to write each chapter of our life story in a way that embodies our values.

Perhaps you've wished you could do even more for Special Olympics but were concerned about making a commitment you might not be able to keep or using resources you might, in the future, need for yourself. You may be surprised to learn that most legacy gifts:

- Require no immediate donation. The gift transfers to Special Olympics only after your lifetime.
- Maintain your ability to change your mind at any time. You are not locked into a decision you make today.
- Are welcome in any amount. You can make loved ones and Special Olympics your beneficiaries.

Following are some of the easiest ways to leave a legacy gift to Special Olympics.

### A Gift from Your Will or Trust:

A gift from your will or trust is a time-honored way of ensuring that your support of Special Olympics continues for generations to come.

You have several options to create a gift that meets your needs and the needs of your family, including:

- A gift of a specific amount or a particular asset
- A percentage of your estate
- Funds that remain after loved ones are provided for
- A contingent gift that only comes to Special Olympics if your other beneficiaries do not survive you or other specific gifts cannot be fulfilled

When you create or update your will, simply ask your attorney to include a gift to Special Olympics and discuss the type of gift that fits your plans.

### Gifts of Retirement Plan Assets:

Many of us have sacrificed to accumulate retirement savings in expectation of a long and comfortable retirement. Those same frugal habits often result in not using all the money we've saved. Most retirement plans are subject to income and possibly estate tax when transferred to others. That's why, from a tax perspective, the best legacy gift to charity is often from a retirement plan.

If you designate Special Olympics as a beneficiary of your retirement plan, you can:

- Leave other, less heavily taxed assets to your family.
- Change your beneficiaries at any time, retaining maximum flexibility.
- Take action without the expense of an attorney. Simply request a change of beneficiary form from your plan provider and include Special Olympics as a full or partial beneficiary.
- Celebrate knowing that, as a tax-exempt organization, 100% of your gift will benefit the next generation of Special Olympics athletes.



### **Gifts of Life Insurance:**

Most people use their life insurance policies to provide financial security for a spouse, child or other loved one. But over time, the needs of your family may change. A life insurance policy that has outlived its purpose or needs updating may be the perfect vehicle for leaving a gift to Special Olympics. Just ask your insurance company for the appropriate forms to make Special Olympics the owner or beneficiary of the policy. You may also name us as a contingent beneficiary, so the policy passes to us only if your family members predecease you.

### **Other Financial Accounts:**

One of the simplest ways you can help ensure Special Olympics' future is by making Special Olympics the Pay on Death (POD) or Transfer on Death (TOD) beneficiary of a certificate of deposit (or any bank or brokerage account, for that matter). You can also name Special Olympics as a beneficiary of a donor-advised fund. Your financial institution can assist you with this no-cost-to-you process.

### **Include a Gift for Special Olympics:**

You are in no way obligated to do so, but we hope you will please let us know if you have included a gift to Special Olympics in your will or trust, or by beneficiary designation.

Providing us with notice of your intention is the best way to ensure that we receive the gift you have planned for us, and we are best able to honor your wishes when we know of them in advance. We would also like to thank you and welcome you to The Champion's Society®, our way of recognizing the exceptional individuals who have made Special Olympics a part of their lasting legacy.



# The Champion's Society®

In the Olympic tradition of excellence and magnificence, The Champion's Society® members are the guardians who protect our athletes' future by providing for Special Olympics in their estate and financial plans. This devoted community of supporters shares a strong common bond of generosity and leadership. Like the athletes whom it benefits, The Champion's Society® transcends all boundaries, appreciates any gift amount and was created to pay tribute to the dedicated individuals who have included Special Olympics in their will or other estate and financial plans. Through their gifts, they demonstrate their commitment to honor and memorialize past athletes, current athletes and the athletes of the future.

## What You Need to Complete Your Gift

- To support the Special Olympics movement in the U.S. and around the world, a gift to the national headquarters requires this legal name and tax ID number:

**Special Olympics International**  
**Tax ID 52-0889518**

- To include a gift to your local Special Olympics chapter affiliate, you will need their legal name and tax ID number. Please contact Connie Grandmason toll free at (866) 690-3951 or [plannedgiving@specialolympics.org](mailto:plannedgiving@specialolympics.org). Connie will be happy to provide your chapter's legal name and tax ID number.

## Do You Have Questions?

The Special Olympics gift planning staff is available to help you explore how to plan and include a legacy gift to Special Olympics. If you have already left a gift to Special Olympics in your will, trust or by beneficiary designation, we hope you will let us know so that we may properly thank you, ensure that your wishes are carried out, and welcome you as a member of our legacy society, The Champion's Society®.



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at [solegacygiving.org/resources](http://solegacygiving.org/resources)**

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