

## You can help create a lasting legacy

Hopefully, NAMI DuPage has in some way positively affected your life, be it through support groups, education, advocacy or simply the fellowship of talking with other individuals, parents or families living with mental illness.

With a simple gift that costs nothing during your lifetime, you can make a transformational difference to strengthen NAMI DuPage's array of support and educational programs that can provide hope and recovery for future generations.

### Next Steps

#### If you are planning a gift:

- Please seek the advice of your accountant, financial and/or legal advisor to assist you in determining what type of gift best suits your personal and financial circumstances.
- Contact the NAMI DuPage Development Department for additional information or visit the Planned Giving link on our website.

#### If you have made a gift:

**Thank you for the trust you have placed in NAMI DuPage.**

- Please use our legal name of "NAMI DuPage County, Illinois." Our Federal Tax ID: 36-3412057.
- Please submit a **Letter of Intent** located on our website. This provides a way to recognize and thank you during your lifetime, and ensure that your wishes are properly documented. The Letter of Intent shall affirm a commitment to NAMI DuPage but shall not be binding upon your estate.



**Our Mission:** To provide support, advocacy, and education in order to improve the quality of life of individuals with mental illness and their families.

What you leave behind is not what is engraved in stone monuments, but what is woven into the lives of others.” – Pericles

**For more information** on planned giving, **please contact:**

**William B. Peterson,**  
Development Director

**NAMI DuPage**  
115 N. County Farm Rd.  
Wheaton, IL 60187

**phone:** (630) 752-0066 x 202  
w.peterson@namidupage.org

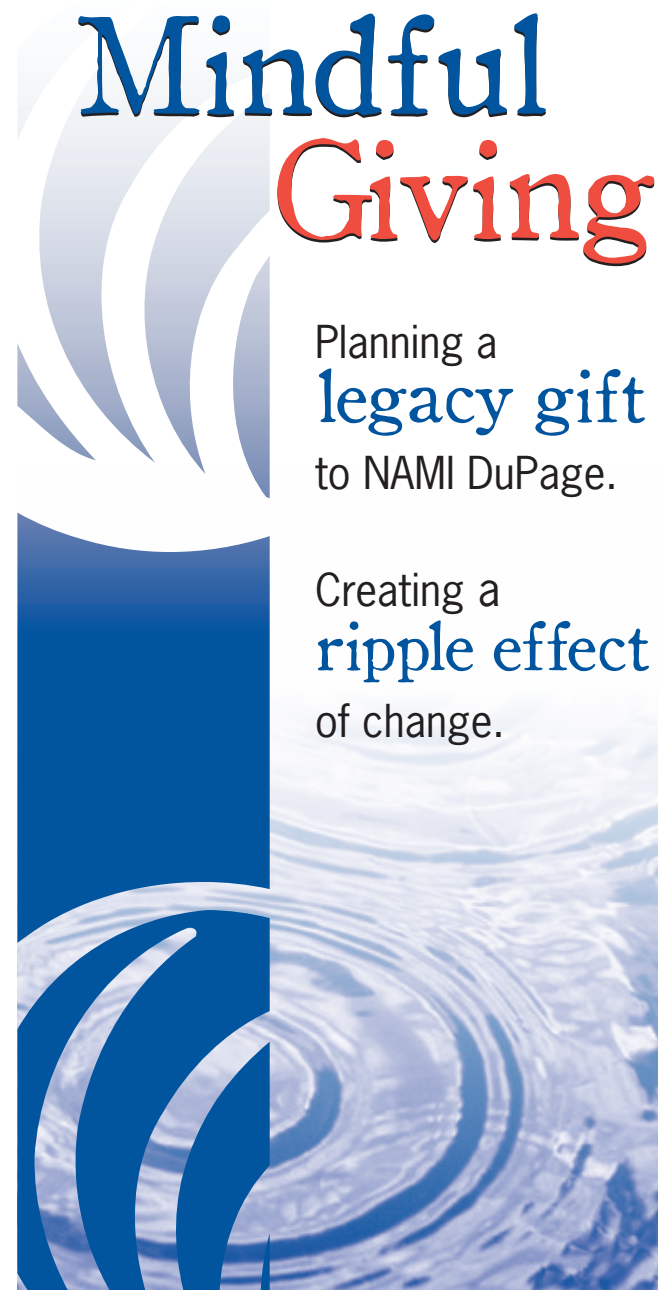
**Website:** [www.namidupage.org](http://www.namidupage.org)



# Mindful Giving

Planning a legacy gift to NAMI DuPage.

Creating a ripple effect of change.



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## What is Planned Giving?

Planned gifts are donations made to NAMI DuPage as part of your overall financial or estate plan created during your lifetime that will take effect at or after your passing. With a little forethought and planning you can make a significant gift to the organization without affecting your current lifestyle or your family's security.

## Planned Giving Benefits

- Making a larger charitable gift than you thought possible;
- Providing inheritances for your heirs at a lower tax cost;
- Reducing your income tax and even avoiding capital gains taxes;
- Leaving a legacy without giving up assets;
- Satisfaction in knowing that your legacy will make a difference in the lives of others who live with mental illness.

## What is the Legacy Society?

The Mindful Giving Legacy Society was created to recognize the generosity of individuals and families who have made or provided for planned gifts to NAMI DuPage. When you become a member of the Society you create a legacy of caring for individuals and families living with mental illness that continues forever. Furthermore, it may inspire generosity in others.

There is no minimum amount required to join, just a simple promise to remember NAMI DuPage as a component in your legacy gifts. Your generous gift will assure the long-term stability and financial strength necessary for us to continue to serve our mission.



**NAMI** | DuPage  
County  
National Alliance on Mental Illness

## Planned Giving Options

To leave a lasting legacy to NAMI DuPage, please consider the following planned giving options:

- **Legacy Gifts (Bequests):** You name NAMI DuPage as a future beneficiary through your Will or Living Trust in which you designate a specific dollar amount or a percentage of your estate after other disbursements.
- **Retirement Plan Designations:** You name NAMI DuPage as a future beneficiary in your IRA, 401(k), or 403(b) retirement plan.
- **Beneficiary Designations:**
  - **Payable on Death (P.O.D.) Accounts:** You name NAMI DuPage as future beneficiary of a bank account, such as a checking, savings or money market account, Certificate of Deposit (CD) or US Savings Bond.
  - **Transfer on Death (T.O.D.) Accounts:** You name NAMI DuPage as a future beneficiary of a non-retirement investment account, such as stocks, bonds, and brokerage accounts.
- **Life Insurance Policies:** You name NAMI DuPage as a future beneficiary of an existing life insurance policy which you currently own but no longer need.
- **Real Estate:** You make a gift of all or a portion of your appreciated property, such as your primary residence or vacation home, to NAMI DuPage through an outright deed or through a bequest provision.
- **Charitable Remainder Trusts:** You transfer cash or property to an irrevocable charitable trust. The trustee sells your property tax-free and provides you, or a second beneficiary, with a fixed (Annuity Trust) or variable (Unitrust) income for life or a set term. At the trust's termination or upon death, the trust assets become a generous donation to NAMI DuPage.
- **Charitable Lead Trusts:** You contribute property to an irrevocable trust. The trustee makes an annual income payment to NAMI DuPage for your lifetime or a set period of years. At the end of the term, the trust property is distributed back to you or to your heirs. This provides generous annual support to NAMI DuPage now, removes assets from your estate and passes an asset to heirs with little or no tax.