

# Options

Building inclusive communities

OPTIONS, INC.

## FUTURE FOCUS

### MAKING A DIFFERENCE

Options partners with people with disabilities and their communities to bring about self-directed lives. With support from you and our community, we have recently been able to:

- ∞ Acquire twelve affordable housing units with funding from the City of Bloomington, Federal Home Loan Bank of Indianapolis, and Options.
- ∞ Provide respite services to fifty-five families who did not have other funding sources.
- ∞ Increase capacity for employment services and provide service to over seventy people.
- ∞ Partner with Night Owl Support Services to provide state of the art electronic monitoring services to increase independence.
- ∞ Double enrollment in Options' continuing education program offering a variety of classes to help build leadership and self-advocacy skills.
- ∞ Provide DSP's, Options front-line staff, with advance training to acquire college credit.



After 27 years of service, Options continues to be a leader in services to people with disabilities that result in active citizenship, rewarding employment, and fulfilling relationships.

Options success is the community's success and our endowment fund can ensure future stability and growth for all involved. An endowment fund provides a relatively constant source of annual income, covers future and unexpected needs, while demonstrating security and long-range financial planning.

By making a planned gift to Options' Endowment Fund, you are helping to plan for the future of the organization, its customers, and our community. Please join us on our journey as we plan for the next 25 years and see how you can continue to make a difference.

### MAKE AN IMPACT

My husband and I have been long time board members, friends and supporters of Options and wanted to make a donation to the Options Endowment Fund. After exploring all of the many ways to give, we chose the insurance policy option. We decided to name Options as our beneficiary. It was very easy to do. I just made one phone call to our insurance agent. The agent sent me a one page form and we completed the form, signed it and sent it back. Upon my death, Options will receive a check.

If you don't have a current insurance policy, you can purchase one for this particular purpose. Also, you have a choice on whether to designate a portion of the proceeds or the entire proceeds to Options. We want Options to be here for future generations and we hope this gift will help secure its future.

*Mary Beth Roedel*



*"We want Options to be here for future generations and we hope this gift will help secure its future."*



# MAKE A LEGACY

Contributing to Options Endowment Fund will help pave the road towards Options' financial stability and what we are able to accomplish in the next 25 years. It will also tell your story of the legacy you leave behind. At the end of life's journey, each of us needs to know that we have contributed to others and that our life has meaning. For what we have contributed to others, to our families, and to our community is the legacy we leave. For more information about the many ways you can make an impact with Options and the people we partner with now and into the future please contact us at 1.800.875.9615.

The following are a few of the ways you can leave a legacy:

- ☞ Prepare a will. Fewer than 50 percent of those who pass away have one. Without a will, you can't be certain how your assets will be distributed.
- ☞ Leave a gift in your will for the non-profit organizations that made a difference in your life. Less than five percent of American households have included non-profit agencies in an estate plan. Imagine the positive impact on our community if everyone made a donation to a favorite organization.
- ☞ Consider various assets for your charitable gift, like IRAs, savings bonds, stocks, bonds, CDs, real estate, vehicles, art, and jewelry. Such gifts may even provide tax savings.
- ☞ Name your favorite non-profit as the beneficiary of your pension or IRA.

- ☞ Purchase a new life insurance policy naming your favorite non-profit as the beneficiary.
- ☞ Name your favorite non-profit as the beneficiary of an existing life insurance or annuity contract.
- ☞ Remember loved ones with memorial gifts.
- ☞ Consider establishing a life income gift that will provide current income to you and your loved ones for your lifetime, while providing significant tax benefits.

**At the end of life's journey, each of us needs to know that we have contributed to others and that our life has meaning.**

**For what we have contributed to others, to our families, and to our community is the legacy we leave behind.**

*Adapted from the National  
Committee on Planned Giving  
www.npcg.org*

NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_ I/WE WISH TO REMAIN ANONYMOUS

E-MAIL: \_\_\_\_\_

I/We would like information on how we can help through:

- Insurance Policy     Charitable Remainder Trust
- Outright Gift     Charitable Lead Trust
- Gift of Property     Gift Annuity Agreement
- Named Memorial     Pooled Income Fund
- Bequests     Other: \_\_\_\_\_

I/We are interested in contributing to the endowment fund:  
\$ \_\_\_\_\_

I/We would like to become part of the Leadership Circle  
(\$10,000 or more): \$ \_\_\_\_\_

METHOD OF PAYMENT     Visa

Check payable to Options     MasterCard

Bill Me

Pledge

\_\_\_\_\_  
Credit Card #

\_\_\_\_\_  
Exp. Date

\_\_\_\_\_  
Signature



PO Box 1732, Bloomington, IN 47402

800.875.9615 x 218