

*"The people with disabilities served by Bobby Dodd Institute have been near and dear to our hearts for almost 15 years. Making a planned gift seemed like a logical extension of that support and an opportunity to make a big difference through our estate planning. We are very honored to have been asked to associate our names with this society and hope that others will see the good they can do through planned gifts to BDI."*

*- Ann and Jay Pearce*

#### *Disclaimers*

The nature and extent of any tax benefits, retirement income and wealth preservation for each individual will vary depending on the size and nature of the estate in question and the structure of the gift. BDI strongly encourages donors to work with professionals (lawyers, accountants, and/or financial planners) when planning their estates. If you do not have a relationship with an estate planning professional, please call BDI directly for a referral.

Bobby Dodd Institute  
2120 Marietta Blvd  
Atlanta, GA 30318  
678.365.0071 main  
678.365.0098 fax  
678.365.0099 tdd

*Ann and Jay Pearce Legacy Society*  
Planned giving benefitting Bobby Dodd Institute





### *About Bobby Dodd Institute*

Bobby Dodd Institute (BDI) empowers individuals with disabilities and disadvantages to maximize their potential by securing economic self-sufficiency, independence, and integration into society by offering a broad array of high-quality career services and employment opportunities. We improve the lives of hundreds of people every year through sustainable employment and provide the community with a significant return on charitable gifts in terms of wages earned, taxes paid, and reduced public assistance received by the people we serve.

### *About the Ann and Fay Pearce Legacy Society*

The society is named for long-time board member, E. Fay Pearce, Jr., and his wife, Ann, who have given countless hours and resources to advance BDI's mission while enlisting others to join them. Through estate planning, the Ann and Fay Pearce Legacy Society provides a new way to make a meaningful difference in the lives of people with disabilities and disadvantages. For the committed donor, giving via a will or trust is a natural continuation of lifetime giving. In many cases, it can even save on estate taxes and help preserve wealth for heirs while benefiting a fantastic organization.

### *Membership Criteria*

Membership shall be composed of individuals who have made an approved planned or deferred gift to BDI in the amount of \$5,000 or more, including bequests, trusts, or other instruments under BDI's board-approved gift acceptance policies. A formal letter of intent to make a gift and/or other documentation may be required. All gifts shall be recorded according to GAAP and will be treated in accordance with the Association of Fundraising Professionals' Donor Bill of Rights.

### *Membership Benefits*

By joining the Ann and Fay Pearce Legacy Society, you will:

- Be recognized in BDI's annual report
- Receive BDI's donors-only e-newsletter
- Receive invitations to donors-only events
- Receive tax benefits
- Have the opportunity to remember your loved ones with a named memorial gift
- Possibly increase your retirement income
- Possibly preserve a greater amount of wealth for your heirs
- Benefit your community
- Leave a lasting legacy

*"As I developed my giving plans I wanted to utilize my IRA as effectively as I could upon my passing. At the time of my death as much as 70 percent of my IRA would be taxed. That's why I decided to support BDI by joining the Ann and Fay Pearce Legacy Society. BDI is one of the organizations that has impressed me with the effective and compassionate implementation of their mission. I would urge you to consider BDI when planning for your future estate."*

*-John Weitnauer,  
Ann and Fay Pearce Legacy Society Member*

### *Popular Ways to Give*

#### *Bequest*

The easiest way to remember BDI in your estate plans is to set aside a certain dollar amount or percentage of your estate in your will or living trust.

#### *Charitable Remainder Trust or Charitable Lead Trust*

For estates subject to estate taxes, this is a way to give that provides tax benefits and potential income for you and/or your heirs.

#### *Retirement Account*

Retirement accounts can be subject to heavy taxation at an individual's death. Making BDI a beneficiary of a 401(k), 403(b), IRA or other retirement account is an easy way to make a significant gift to a meaningful cause.

#### *Gift of Real Estate*

A gift of a home or other real estate is a good way for almost anyone to make a significant contribution to BDI.

#### *Life Insurance*

Naming BDI as a beneficiary of a fully paid life insurance policy is a quick and easy way to leave a legacy.

#### *How Do I Join?*

To join the Ann and Fay Pearce Legacy Society, notify BDI of a gift you have already planned, or to receive more information, please contact David R. Pass, CFRE, Director of Stakeholder Relations, at 678.365.2260 or david.pass@bobbydodd.org.