



Special Olympics

Dreams for the Future

Estate Planning for Friends of Special Olympics



Support Forward Movement

Amy Wurst's introduction to Special Olympics over 25 years ago was not quite what she expected. "By the end of the day I'd had three marriage proposals!" She had volunteered to referee a basketball tournament and it wasn't just the affection from the athletes that moved her, "I was genuinely appreciated and loved by everyone for simply showing up to help."

After that first volunteer experience, Amy was hooked. She said that it was not only the accomplishments of the athletes that motivated her, it was also the remarkable group of volunteers. "It's their life dedication to this important work and their passionate devotion to the athletes that amazes and inspires me to do more." This devotion over the years has led Amy to have several positions with Special Olympics: volunteer, games management and even board member.

Recently, Amy decided to make an even deeper commitment to Special Olympics and included the organization in her estate plans. She explained, "I think there are many people who believe that they must leave all their money and assets to their family. It's easy to include both your family and the causes you love. Anyone can give and it costs nothing to include Special Olympics in your plans now."

Amy feels good knowing that her gift will make a lasting impact in the lives of the athletes she has come to love and respect. "We've come such a long way in how the world perceives people with intellectual disabilities since the 1960s. My gift through my estate plan will ensure that those perceptions never take a step back."



If you would like to learn more about including Special Olympics in your estate plan, like Amy, contact the Office of Gift Planning at (866) 690-3951 or use the enclosed reply card.



Security in an Uncertain World

Turn a Liability into an Income-Producing Asset

If you are one of the more than 60 million Americans holding a Series E or H savings bond, you are no doubt aware that your bonds have stopped earning interest. What's more, if you redeem your bonds or leave them to a loved one, you or your loved one will owe income tax and possibly estate tax on the proceeds. Instead, save on taxes and turn your inactive asset into an income-producing one by creating a charitable gift annuity with your savings bond proceeds.

Similarly, some stocks have appreciated nicely over the past few years, resulting in capital gains tax that may be due at year-end. If you use those appreciated securities to create a charitable gift annuity, you will avoid some capital gain at the time you make your gift and the rest of the capital gain will be spread out over your life expectancy.

In these times of uncertain returns and market volatility, charitable gift annuities are a great option. You receive annual payments that never go down and the payment rates are attractive.

Want to see what your payments and tax savings would be based on your age and gift amount? There is no obligation on your part to learn more. Simply give Connie Grandmason a call at (866) 690-3951, e-mail her at cgrandmason@specialolympics.org or use the enclosed reply to receive a free proposal.

Sample Single-Life Gift Annuity Rates*

AGE	RATE	ANNUAL PAYMENT FOR \$20,000 GIFT ANNUITY
65	5.3%	\$1,060
70	5.8%	\$1,160
75	6.5%	\$1,300
80	7.5%	\$1,500
85	8.4%	\$1,680
90+	9.8%	\$1,960

*Based on current American Council on Gift Annuities rates, effective as of July 1, 2011. Rates are revised periodically.



Turn a dormant asset into an income-producing one by converting your savings bonds to a charitable gift annuity.

"I was surprised to learn that I could make a generous donation to Special Olympics and receive fixed payments for the rest of my life. It was a good investment and the payments are a great supplement to my retirement income."

Marilyn L. Davis, Charitable Gift Annuity Contributor

Test Your Knowledge

The Facts about Bequests May Surprise You

Test your knowledge by reviewing some of the most commonly asked questions.

Q. I'm committed to Special Olympics but I want to make sure my children and grandchildren are taken care of, too. Is there a way to do both?

A. We agree that family comes first. But some charitable gifts can actually be a tax-wise strategy that benefits loved ones. For example, naming Special Olympics as the beneficiary of an IRA or other retirement account and leaving less heavily taxed assets to heirs can actually benefit all of us. You might also consider a bequest to Special Olympics leaving the largest amount for your children and grandchildren. Here is language you can use:

To make a bequest to Special Olympics, Inc., headquarters:

"I give, devise and bequeath _____ percent or \$_____ of my estate to Special Olympics, Inc., Washington, DC, for its unrestricted use and purpose."

Or, to benefit a local Special Olympics chapter affiliate:

"I give, devise and bequeath _____ percent or \$_____ of my estate to Special Olympics (insert local chapter affiliate name here along with their city, state), for its unrestricted use and purpose."

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Q. I've thought about including Special Olympics in my will but I'm not rich. Will my small gift make a difference?

A. Every gift makes a difference and helps ensure that individuals with intellectual disabilities will continue to benefit from Special Olympics.

Q. I'm reluctant to tell you that I'm including you in my will. What if I change my mind?

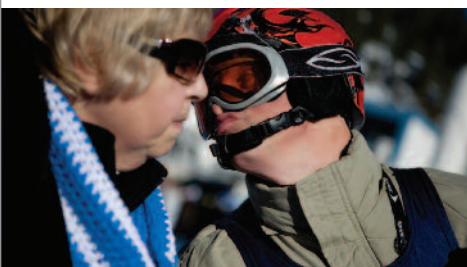
A. We understand that circumstances change. One of the best things about a bequest is that you can change your beneficiaries at any time.

Q. I want to make a bequest to Special Olympics but my will is already written and I don't want the expense of having it rewritten.

A. A codicil is a simple amendment to a will, which avoids the cost and complication of rewriting an entire will. The codicil must be signed and witnessed or notarized as is the original will. Call us at (866) 690-3951 to receive a sample form or you can print a form directly from our website by visiting www.specialolympics.org/codicil.

Q. What should I do next?

A. Review your personal wishes and options with your legal advisor. And if you include Special Olympics in your estate plans, please let us know. We would like to thank you and to make sure we understand your wishes.





Your Donation Makes a BIG Impact: Top Honor for Special Olympics

On August 25, 2011, Philanthropedia ranked Special Olympics as the *top* nonprofit organization serving people with disabilities. Philanthropedia is a subsidiary of GuideStar, which encourages charitable giving by promoting financial responsibility and transparency among nonprofit organizations.

This is a tremendous distinction for Special Olympics. Ranked first of 11 leading nonprofit organizations serving people with disabilities, Special Olympics was awarded this top distinction by 79 experts, including seasoned foundation professionals, nonprofit senior staff, academics and researchers.

In the review, one expert commented, "Special Olympics was out front in breaking stereotypes about people with disabilities, especially developmental disabilities. SO showed parents as well as the general public that people with disabilities could be involved in sports and recreation, function as members of teams and live full lives." Special Olympics was also recognized for its strengths in leadership marketing, as well as for a dedicated network of volunteers and organizational reach.

"On behalf of our entire Special Olympics movement worldwide, we are honored to be given this prestigious ranking from Philanthropedia,"

said Dr. Timothy P. Shriver, Chairman and CEO of Special Olympics. "This recognition reflects the hard work of all our athletes, coaches, volunteers and leadership to show the world the power of sport to create acceptance and inclusion for people with intellectual disabilities."

Please know that any gift you give to Special Olympics through your estate plans will make a huge impact in the lives of people with intellectual disabilities.



For More Information
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Toll-free: (866) 690-3951
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www.specialolympics.org/givingwisely



Special Olympics