IRA ROLLOVER
If you are over 72 years old, and have an IRA, a Qualified Charitable Distribution (QCD) can count toward your annual Required Minimum Distribution (RMD) and is not subject to income taxes (up to $100k).

THE STEWARDSHIP FUND
In 2012, planning for the future, Senior PharmAssist started The Stewardship Fund.

Our goal is to grow this fund to $1.4 Million by 2021, when our largest private funder will close their doors.

Contributors who give or pledge over $5,000 to this Fund join the Legacy Society (see reverse).

Gifts of any size are a meaningful investment in our work, however, we ask that Stewardship Fund gifts be above and beyond your support of our operating budget.

STOCK GIFTS
Gifts of stock to Senior PharmAssist are sold immediately by the Orchid Group at Morgan Stanley, which generously waives all fees. Stock gifts are not subject to capital gains tax.

IRA ROLLOVER
If you are over 72 years old, and have an IRA, a Qualified Charitable Distribution (QCD) can count toward your annual Required Minimum Distribution (RMD) and is not subject to income taxes (up to $100k).

PLANNED GIVING
There are several options for planned giving - please consult your tax adviser about the benefits of donating a Health Savings Account (HSA), setting up a Charitable Remainder Trust, Charitable Lead Trust, or adding Senior PharmAssist as a beneficiary to an insurance policy or retirement account.

Also, several generous supporters have let us know that Senior PharmAssist will be included in their will or living trust (see reverse). We invite you to join this group of investors in our work.

PROPERTY
We are also equipped to accept gifts of property, including vehicles, land, and more!

TAXES CHANGES - CARES ACT
In 2020, new tax incentives were passed as part of the CARES act, giving donors who take the standard deduction the option to claim an above-the-line deduction of up to $300 for cash contributions.

Donors who itemize their deductions can claim up to 100% of their Adjusted Gross Income (increased from 60%).

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THE LEGACY SOCIETY
Investors who have contributed/pledged $5,000 or more to the Stewardship Fund

Anonymous
Acriel Foundation
John and Sandra Atkins
Shirley Few
Kay and Wade Gresham
Thomas Krakauer
Peg Lewis
Ruth Mary & Horst Meyer
Ann Carole Moylan

Frances Rollins
Marie & David Sappenfield
John Stelling & Victoria Herring
Perry Sloan
Woody & Marty Warburton
Karen & Mark Webbink
John Weeks
Chuck and Jean Wilson

BEQUESTS - PAST AND FUTURE
Individuals who have included us in their wills or living trusts

Anonymous
Becky Bowden
Dan Hudgins and Ann McKown
Margaret Keller
Victor B. Moore, Jr. Family Charitable Remainder Trust
Evelyn D. Schmidt
John Stelling & Victoria Herring
Gina Upchurch

NEXT STEPS

CONTACT US
Jane Tandler: 919-956-5812
jtandler@seniorpharmassist.org
Gina Upchurch: 919-956-5812
gina@seniorpharmassist.org

STOCK GIFTS
To arrange a stock gift, contact Sean Fenton at Morgan Stanley's Orchid Group at 919-490-7113 or sean.p.fenton@morganstanley.com