

Financial planning  
ideas for

# Our Family our future

***“Where we love is home—home that our feet may leave, but not our hearts.”*** —Oliver Wendell Holmes

**T**hough she lives in South Carolina, Dalton Gregory’s home—and heart—is in Oregon.

“I live in a beautiful area of the country, but nothing compares to the Pacific Northwest. Mother Nature provides such natural beauty with the trees and forests, the Columbia Gorge, Mount Hood and the coast,” Dalton shared.

On a trip last year to Oregon, Dalton reconnected with another place dear to her heart, ChristieCare which is part of Youth Villages.

*(ChristieCare was founded in 1859, and has been in continuous operation since. ChristieCare and Youth Villages partnered in 2011 to expand services and better serve the needs of children and families in Oregon.)*

## **A family history**

Dalton and her family have a long history with ChristieCare. Dating back to the 1950s, Dalton’s late husband, Dr. Richard C. Godfrey, established a program for area practitioners to provide gratis dental services for ChristieCare residents. He served on the ChristieCare advisory board for many years.

“In addition to the work he did for ChristieCare, Richard helped create the dental clinic at Shriner’s Hospital and was chairman of that unit,” Dalton said. “He was also county chairman of the March of Dimes.”

Dalton was a volunteer at ChristieCare, often driving girls to their medical and dental appointments. Planning to move back to Oregon in the near future, Dalton would like to get involved once again on a volunteer basis.

After her recent trip meeting the staff and touring the campus, Dalton decided to make Youth Villages Christie campus the beneficiary of her estate.

## **Hope for the future**

“We all need to help these children who face so many challenges,” she shared. “My estate will become part of a general education fund for the young men and women at Youth Villages Christie Campus to go to college or university if they choose. Education is so important to one’s future success.”

With her heartfelt gift, Dalton Gregory will make a difference in the lives of many in Oregon.

For information about creative ways to support the life-changing work of Youth Villages, visit us on the web at:  
[www.youthvillages.org/plannedgiving](http://www.youthvillages.org/plannedgiving)

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# Honoring Those You Love

**G**ifts made in honor of family and friends can celebrate milestones in their lives such as births, birthdays, weddings and anniversaries. And when a loved one passes away, a memorial gift is a fitting opportunity to continue to support their favorite charities and honor their values and priorities.

Making charitable gifts offers a wonderful way to affirm your values and priorities. Honoring a loved one through your giving is an especially meaningful way to pay tribute to someone while ensuring that worthwhile values continue to influence the world around us. Memorial and tribute gifts allow you to thoughtfully remember and honor family members and friends who have played such a vital part in your life.

## Consider the possibilities

There are a number of ways to make your gifts in honor or memory of others.

- **Gifts of cash:** Gifts of cash, by check or online, are the most popular methods of memorial

giving. Such gifts are convenient and can be tax deductible.

- **Other property:** Memorial gifts may also be funded with assets such as stocks, bonds and mutual funds that have increased in value. You not only receive regular tax savings, but you bypass the capital gains tax on qualified assets given for charitable use.
- **Leave a legacy:** Many discover that their long-range estate and financial plans provide a thoughtful way to make memorial gifts in honor of others. See the box below for suggested bequest language.

We are here to offer more information as well as work with you and your advisers to help you make the most of your giving. Simply return the enclosed card or visit our website at [www.youthvillages.org/plannedgiving](http://www.youthvillages.org/plannedgiving).



Justice has a lot of responsibilities to juggle. Every day, the young mother tries as best she can to balance family life with college classes and working at a fast food restaurant. To get help meeting deadlines and accomplishing her goals, Justice joined YVLifeSet.

## Bequest Language

**I**f you are considering a bequest to Youth Villages, here is some suggested wording to take to your attorney:

“After fulfilling all other specific provisions, I give, devise and bequeath \_\_\_\_% of the remainder [or \$\_\_\_] of my estate to Youth Villages, a charitable corporation [Tax ID #58-1716970] currently having offices at 3320 Brother Blvd., Memphis, Tennessee.”

# The Youth Villages Legacy Society

The Legacy Society is Youth Villages' recognition program for donors who have provided for Youth Villages with a planned gift. We are honored to recognize our members. Youth Villages is grateful to these men and women who have made a commitment to our work today and in the future.

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|--|--|--|
| A. Gladys Copeland Living Trust                | Grace Dempsey                                    | Linda and David Young                                  |
| Agnes M. Lindsay Trust                         | Jeaneatta H Sautter                              | M. J. Murdock Charitable Trust                         |
| Amel Peterson                                  | Leah A. Hirsch                                   | Marian and Mike Bruns                                  |
| Andrea Jane Pirollo Irrevocable Trust          | Margaret C. Fernea                               | Marjorie C. Barber Trust                               |
| Ann Hinkel                                     | Margaret Louise Stevens                          | Marler Stone   |
| Atlantic Trust                                 | Neva McMahon                                     | Martha Keith   |
| Bernie and Kelly Lawler Schweiss               | Phyllis O'Bryan Bailey                           | Mellon Trust   |
| Billie V. McDowell                             | Rose P. Garber                                   | Mother Germaine Memorial Trust                         |
| C. Lamar Wallis                                | Ruth M Schulze                                   | Mr. and Mrs. Marvin M. Barofsky                        |
| Clinton Brooks Whitfield                       | Thomas G. Elliott                                | Nelson Jones Estate                                    |
| Cumberland Trust & Investment<br>Company       | Vera Goldman                                     | Nollie and Amanda Henington Trust                      |
| David D. Coleman                               | Esther Maegly Reinecke/Maegly Trust              | Novel Realty Trust                                     |
| Dawn Charitable Trust                          | George Harrington Trust                          | One-Four-Three Charitable Lead Trust                   |
| Dorothy and J. H. Shepherd<br>Charitable Trust | Goldman, Sachs & Co.                             | Pauline and Maurice Riggins                            |
| Edwards Estate                                 | Helen L. Siddon Bogan Charitable Trust           | Phil C. Schreier                                       |
| Ellen Abbott Gilman Trust                      | Hyams Trust; Godfrey M.                          | Rose Swanson Estate                                    |
| Ermee Dixon                                    | Idalia Roth Charitable Trust                     | Schrafft Charitable Trust                              |
| A.B. Roseberry                                 | Ilene S. Lawrence Living Trust                   | Smith Barney Charitable Trust, Inc.                    |
| Albert R. Capley                               | Jack Ladd Household                              | Stevens-Plock Estate                                   |
| Claire M. Mitchell                             | Jan and Patrick Lawler                           | Atticus Trust  |
| David Charles Goggio                           | Jane B. Cook Charitable Trust                    | Cousens Trust  |
| Dean Stanley                                   | Jane's Trust                                     | Marilyn V. Lind  |
| Elizabeth C. Weaver                            | Janey Charitable Trust                           | Nancye Fleming Markle Charitable<br>Trust for Children |
| Elizabeth H. Perkins                           | John W. Alden Trust                              | Paul W. Barret Jr. Charitable Trust                    |
| Fanny Rosenfield                               | Joseph E. & Frances E. Heney<br>Charitable Trust | R. W. Babson Trust                                     |
| Flora Crenshaw                                 | Joy Velte  | Tully-Graves Foundation                                |
| Frederick L Maltby                             | Laffoon Family Trust                             | Victoria Rowell Rev. Trust                             |
|  | Lela Almaria Johnson Estate                      | William G. Harvey                                      |

## Does My Will or Living Trust Need Updating?

If you already have a will or living trust, congratulations! But are you sure it's up to date?

Consider the many events that can necessitate a review of your plans:

- A move to another state
- A change in financial circumstances
- A change in family status
- A change in the property you own
- A change in the way you wish to provide for children, grandchildren or other loved ones
- A change in your charitable interests
- A change in tax laws

These and other events may mean your plan needs updating. Talk to your attorney to schedule periodic reviews of your plans.

# Six Siblings Find a Forever Family

**K**atherine, Austin, Riley, Bailey, Jullian and Sophia—all under the age of 14—entered foster care and moved into Donna and Francisco Zuniga’s foster home. After being placed with another family for three years, the siblings returned to the Zuniga’s home for good.

“It was tough for them to move back and forth,” said Erica Lewis, Youth Villages counselor. “But ending up with Donna and Francisco was meant to be.”

The siblings experienced domestic violence, physical abuse and homelessness in their biological home. Riley has William’s Syndrome, causing medical and developmental issues. He has to have open-heart surgery.

“His medical needs were neglected by his biological parents,” Erica said. “Now, he has all the support he needs. Donna and Francisco will be with him every step of the way.”

Donna and Francisco invest time and energy into each child. They provide the love, attention and commitment the kids need.

“All of the children have made great strides in the home,” said Suzanne Jones, Youth Villages adoption



The Zuniga family finalizes the siblings’ adoption.

specialist. “The parents have been instrumental in keeping the siblings comfortable and under one roof.”

Donna and Francisco have another adopted son, Josh, and an older daughter, Kelly. Together, they welcomed the six siblings into their forever family. They celebrated with friends, family and Youth Villages staff.

“I have watched each family member gain patience and loving understanding for one another through this process,” Erica said. “We are so thankful for the strong bonds this family has created.”

## Explore Other Giving Options

You can make future gifts to Youth Villages from financial plans you may have previously earmarked for other purposes:

- Name Youth Villages as beneficiary of all or a portion of the remainder of retirement plan accounts.
- Give a share in the proceeds of life insurance policies no longer needed for their original purpose.
- Name Youth Villages to receive all or a portion of what remains in investment accounts through what are known as “pay on death” provisions.



**Youth VILLAGES**<sup>®</sup>

The force for families

**For planned giving information,  
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Youth Villages is a holder of the BBB Wise Giving Alliance National Charity Seal.



Youth Villages is a Silver-Level Guidestar Exchange participant, demonstrating its commitment to transparency.