



Fostering recovery,  
building independence and  
changing destinies

# Charitable **Giving Options**

Building Brighter Futures





## Our **Mission:**

### Fostering Recovery, Building Independence and Changing Destinies

Coleman Health Services is a nationally recognized, nonprofit organization. Founded in 1978, we offer programs for individuals diagnosed with behavioral health challenges to help improve their lives every day. Some of the services we provide include:

- **24/7 crisis services at our walk-in centers or via telehealth**
- **Behavioral health and addiction recovery services**
- **Safe and affordable community housing for adults and youth transitioning to adulthood**
- **Programs for those individuals seeking employment**
- **Mobile Response Stabilization Services for youth**
- **Adult Day Services for those who are suffering from dementia or who have developmental disabilities**
- **Consultation Services for other nonprofits seeking our expertise**

Coleman Health Services serves over 39 counties in Ohio.

## Our **Commitment:**

At Coleman, we are committed to fostering recovery, building independence and changing destinies for individuals, families and businesses in our community. Whether you're seeking services for crisis management, mental and behavioral health, adult care, employment or another concern, we are here to help you, regardless of your ability to pay.

## Our **Philosophy on Philanthropy:**

Inspired by our common concern for the mental health needs of the communities we serve, Coleman Health Services, our staff, and Boards dedicate our philanthropic efforts to raising both money and awareness to help the organization meet its mission and future needs. Funds raised from individuals, organizations, corporations, foundations and other entities benefit our clients throughout Ohio.

Philanthropy enhances the capabilities of Coleman Health Services to be responsive to the mental health care needs of our community. The Resource Development team not only oversees the solicitation of funds and grants but receives, receipts, records and acknowledges all gifts in order to disburse them in the best interests of the organization, as intended by our very generous donors.

## From Our Chief Executive Officer

Coleman Health Services is extremely grateful to the many individuals who make our mission of fostering recovery, building independence and changing destinies possible.

Philanthropy can be a powerful driver in enhancing Coleman's ability to provide evidence-based and trauma informed behavioral health care, treatments for mental health and addiction, to combat pervasive homelessness and to achieve employment success. Philanthropic support is vital and necessary if we are to remain at the forefront and improve the lives of individuals, families and businesses in Ohio.

The information provided in this booklet may be able to help you achieve your philanthropic giving goals while helping Coleman, too.

The Coleman Health Services Resource Development team looks forward to discussing the many gift planning possibilities available with you, your family and your personal financial advisors to help you reach your personal financial and charitable goals.

Gratefully,  
Hattie Tracy



Hattie Tracy  
President & CEO

## Laura's Legacy: Transforming Lives at the Walter Capling Apartments



Walter Capling, originally from New Jersey, grew up enjoying school, sports, music, and chess. Excelling particularly in academics, he gained admission to the University of California, Berkeley. However, during the first year, Walter experienced the first episode in what would become numerous psychotic breaks, leading him to drop out of school. He became homeless and was frequently beaten and robbed. With the support of family and friends, he moved to Kent, Ohio, and became a Coleman client.

In addition to other services, Coleman provided Walter with stable housing, a crucial element in managing his mental health and fostering a fulfilling life. To honor her son's story, Walter's mother, Laura Capling, bequeathed money

to Coleman for residential services. Her financial contribution led to the establishment of the Walter Capling Apartments on Main Street in Kent, comprising 11 permanent residences for individuals who would otherwise be homeless or housing insecure. Laura wanted to provide a light in the darkness for men and women who are struggling as her son had.

One of those individuals is Carla. She once slept on church steps and wandered aimlessly. Coleman's Crisis Services provided her a lifeline, helping her regain stability and embark on mental health recovery. When she moved into the Walter Capling Apartments, it marked the end of her housing insecurity. Empowered by stability, Carla earned her bachelor's and master's degrees, attributing her changed destiny to Coleman's housing support.

Laura Capling's philanthropic legacy resonates through these apartments, standing as a testament to the enduring impact of compassionate support and stable housing on individuals overcoming mental health challenges and housing insecurity. In a world where philanthropy shapes destinies, the Walter Capling Apartments symbolize the transformative power of giving, offering hope, stability, and a brighter future to those in need.



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## What is Gift Planning?

Gift planning at Coleman Health Services is a highly personal dialogue of discovery between you and Coleman to explore your philanthropic wishes and our changing needs. Successful gift planning allows you to make certain tax-advantageous gifts to Coleman in ways that may maximize personal, family and philanthropic goals, while minimizing costs. The vast array of charitable giving options can be discussed with your personal financial advisors to address your needs and benefits, including:

- **A current charitable income tax deduction to the extent allowable by law**
- **Guaranteed lifetime income for you and/or your loved one**
- **Savings on capital gains, income, gift and estate taxes**

## What to Give

Philanthropy fulfills our innate desire to do good. The act of giving should be joyful. The decision to give should be simple. Everyone can be a philanthropist, regardless of the amount of the donation because you choose what to give, when to give, how to give, where to give and, most importantly, how your gift will be used to help Coleman clients while creating a legacy that will last for the generations ahead.

The good news is that there are many options to help you achieve both your financial and philanthropic goals and each has its own tax-saving advantages.

In addition to making a current **outright gift** (by check, transferring securities, signing a multi-year pledge or a non-binding letter of intent), you can choose a **life-income gift** which pays you and/or your spouse an income for life, or a **testamentary gift** which occurs after your lifetime.

Assets you can use to make a gift to Coleman Health Services:

- **Cash/Check – either personal check or business check**
- **Stocks, Bonds and Mutual Funds**
- **Real Estate (if property meets CHS gift acceptance policies)**
- **Tangible Personal Property such as art or jewelry accompanied by a qualified appraisal**
- **Life Insurance Policy**
- **Retirement Plan Assets and/or IRA's**
- **Business and/or Partnership Interests depending on CHS board approval**





## How to Give Current Gifts

**Outright Gift** – You can make an outright gift to Coleman Health Services by transferring ownership of any of the assets listed above and receive an acknowledgment letter confirming the designation of your gift.

**Multi-Year Pledge** – A multi-year pledge is recurring support that helps sustain the mission of Coleman Health Services and is payable over time. Currently the CHS board has restricted pledge fulfillment to 3-5 years. For example, a traditional \$100,000 pledge could be paid in increments of \$20,000 for up to five years. However, we are happy to work with each individual donor by offering the flexibility of fulfillment in a variety of ways to create the installment schedule that best suits your needs.

## How to Give Deferred and Life Income Gifts

**Gift Annuity** – Coleman Health Services does not currently manage a gift annuity program, but we can work with any community foundation to manage the process for us. A CGA is a simple agreement between you and the community foundation in which they promise to pay you, or you and another person you name, a lifetime income in exchange for your gift which would ultimately come to Coleman Health Services as the beneficiary. The payment amount to you is fixed at the time you establish the gift and is generally paid by the community foundation in quarterly installments.



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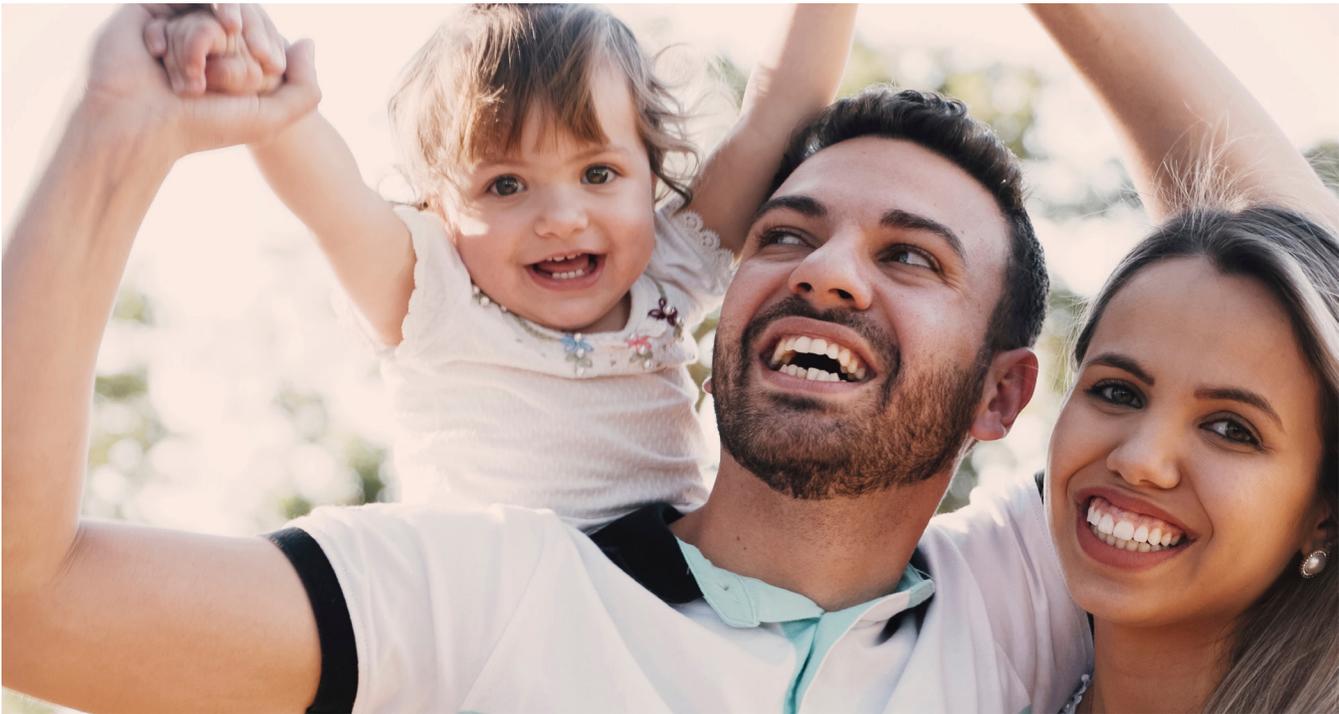
In addition to immediate payments, gift annuities can be *deferred* to begin paying you at a later date such as retirement, or *flexible*, which can be activated at some point in the future. The benefit of deferment or flexible gift annuities is the longer you wait to begin getting annuity payments, the higher the payments will be.

**Charitable Remainder Trust** (CRT) is a good option when there may be multiple beneficiaries, providing for you, you and your spouse, or you, your spouse and your children for life or for a term of years, in exchange for a gift. The payment may be a fixed annuity trust or a variable unitrust based on the year-end market value of the trust.

**Charitable Lead Trust** (CLT) appeals to those wishing to make a gift but retain the property in their family. You can speak with your professional advisor about establishing a lead trust that provides income to Coleman Health Services over a set period of time. At the end of the terms of the trust, the remaining principal is either returned to you or distributed among your family members. The advantage of this type of gift is that it may significantly reduce, or even eliminate completely, gift or estate taxes.

**Retained Life Estate** is a gift plan that allows you to donate your home to a qualified nonprofit like Coleman Health Services but you can live there for the rest of your life! This gift of the remainder interest in a personal residence provides you with a current charitable deduction and may even allow reduction or elimination of any capital gains tax on the property's appreciation. You get to live the rest of your life in your own home and remain responsible for all routine expenses such as maintenance, insurance, property taxes and repairs.





## Testamentary Gifts Made Through Your Will

**Gifts by Will** are made after you have provided for your family and loved ones to support your particular area(s) of interest for Coleman Health Services. By far the most popular way to make a charitable gift as you can use your assets during your lifetime, only a small portion of Americans currently have a Will. We suggest the following language:

*"I give and bequeath to Coleman Professional Services DBA Coleman Health Services, a nonprofit corporation based in Kent, Ohio, (the sum of \$ \_\_\_\_\_ or \_\_\_\_%) to support its exempt purposes."*

- **Please feel free to discuss your ideas with a member of the Coleman Health Services Resource Development team if you are interested in completing a specific designation to ensure we have a full understanding of your intentions when making this gift.**

**Life Insurance** can make a great gift to Coleman Health Services when naming us as beneficiary of your policy, making a gift to us of your paid-up policy, or naming Coleman Health Services as the owner and beneficiary of your new policy. With a gift of a paid-up life insurance policy, you may receive a charitable tax deduction for the cash value of the policy at the time of your gift. When purchasing a new policy, you could then transfer ownership to Coleman Health Services. If there are premium payments that remain to be paid, you could make annual gifts to Coleman to help cover their costs, which may also be tax-deductible for you.

**Retirement Plan Assets** can also be used to name Coleman Health Services as a beneficiary while offering advantageous value; the taxation on your retirement savings that would incur if left to your heirs could be avoided if assets are gifted to Coleman.



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## Creating Your Lasting Legacy

Charitable gift planning may seem daunting and, while there are legal, financial, and tax implications to consider, fostering an open discussion between you, your family, your personal financial advisor and the Resource Development team at Coleman Health Services can help build a legacy; one that reflects your values *now*, and in the *future*.

**Community Foundation** Coleman Health Services utilizes the expertise of the Portage Foundation, the Akron Community Foundation, the Lima Foundation, and the Stark Community Foundation to manage and invest our endowments where the distribution of income is made only for charitable purposes while maintaining the principal in perpetuity. Coleman also encourages the creation of temporarily restricted funds which allow for the distribution of both principal and income for your charitable purposes.

### Named Endowment

**Funds** allow you to choose the name the fund will carry and can be established to honor or memorialize someone special in your life. A named fund can be restricted to a particular area, department or program at Coleman Health Services or be unrestricted and used for the area of greatest need. You direct whether the original philanthropic contribution exists in perpetuity (endowed) with annual distributions from the fund to support



your particular interests or if the original philanthropic contribution is available for expenditure for a mutually agreed-upon term of no less than five years, after which the gift may be renewed or converted to endowment.

**Family Philanthropic Funds** are a great way to engage your entire family in the philanthropic process by allowing family members the opportunity to designate a different area of Coleman to support over the life of the fund. The fund makes annual distributions to the Coleman program your family chooses, and the family may change its designated area of support every two years.

**Donor Advised Funds** are gaining in popularity, quickly becoming one of the fastest growing segments in the nonprofit community. If you currently have a donor advised fund through Schwab, Fidelity or a local community foundation, please consider directing a distribution to benefit Coleman Health Services through a DAF.



## In Recognition for Your Generosity

Coleman Health Services is extremely grateful for the generosity of our many supporters and has created a special **Legacy Society** to exclusively recognize those special benefactors who believe strongly in the mission of Coleman Health Services by including us in their estate plans through the establishment of a bequest, charitable trust, named endowment or other planned gift.

We are especially grateful to these special friends whose legacies and impact keep hope and healing

flourishing for Coleman and wish to recognize each and every contributor through our Annual Report to the Community, special Legacy events, and other opportunities to show our appreciation.

However, we respect the wishes of those donors who may wish to remain anonymous. Please speak with a member of the Coleman Health Services Resource Development team to ensure your information and intentions are followed.



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## Final Thoughts

The information provided here is just a sample of the many options available to you when choosing to support Coleman Health Services through charitable gift planning and is not intended to provide any legal or tax advice. You are encouraged to discuss which of these options meet your needs with your financial advisor or attorney. Coleman Health Services Resource Development team can

help you by discussing various areas within the enterprise you could choose to support; we look forward to working with you to discover where your interests and our mission align through philanthropy.

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**If you, your family, or your advisor/attorney would like more information, please contact us at (330) 676-6876 or [HowToHelp@colemanservices.org](mailto:HowToHelp@colemanservices.org).**

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Because of your gift and the contributions of so many others, Coleman Health Services will remain on the leading edge of behavioral healthcare organizations across Ohio and our mission of *fostering recovery, building independence and changing destinies* for all, **regardless of ability to pay**, will endure for future generations who need our help.

*“The greatest use of a life is to spend it on something that will outlast it.”*

*—William James, American Philosopher*



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**Office of Resource Development**

5982 Rhodes Road  
Kent, OH 44240

**(330) 676-6876 / HowToHelp@colemanservices.org**

Please fill out the form below using a ballpoint pen.

**GIFT PLANNING:** This Gift Planning worksheet provides Coleman Health Services a basis for any recognition given for your generous support of \_\_\_\_\_, and as acknowledgment for your **Legacy Society** membership, distinguishing those who contribute documented gifts to ensure our future and mission. Many donors feel secure in knowing this nonbinding document ensures their intentions are followed and their information securely protected and held confidentially.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Birthday: (Mm/Dd/Yyyy) \_\_\_\_\_ Email: \_\_\_\_\_

Advisor(S): (Estate Attorney, Cpa, Trust Officer) \_\_\_\_\_

**PROVISIONS:** I/We have made provisions for **Coleman Professional Services DBA Coleman Health Services**, a 501(c)3 nonprofit headquartered in Kent, Ohio (Portage County) in my estate planning through one or more of the following gift vehicles:

Percentage or residue of estate; estimate of present value	\$
Outright bequest in my Will	\$
Outright bequest in my spouse's Will	\$
Bequest in my Will if my spouse or other heir(s) predeceases me	\$
Bequest in my spouse's Will if I predecease my spouse	\$
Life Insurance Policy beneficiary designation	\$
Retirement Fund Assets	\$
Donor Advised Fund through Fidelity/Schwab or community foundation	\$
Revocable <input type="checkbox"/> Irrevocable <input type="checkbox"/>	
Trust arrangement with Coleman Health Services as final beneficiary	\$

**Coleman Health Services is not authorized to provide legal or tax advisory services; please discuss with your preferred professional advisor as to what makes sense for your personal situation.**

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Please include age and gender of any other beneficiaries or describe other conditions which may apply

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**PURPOSE:** Please indicate your intentions on how you wish your gift to be used:

\$ \_\_\_\_\_ or \_\_\_\_\_ % unrestricted for the area of greatest need, as determined by the organization's leadership and Board of Directors

\$ \_\_\_\_\_ or \_\_\_\_\_ % for the specific purposes of (please describe):

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It is helpful for the Resource Development team at **Coleman Health Services** to have in its confidential files a copy of your Will, trust agreement or other documentation, or applicable excerpts there from, pertaining to your provisions

May we have permission to contact your preferred professional advisor (estate attorney, CPA or trust officer) for additional information that may be needed to help ensure we use your gift for the purposes specified above by your donor intent?  Yes  No

**RELEASE FOR RECOGNITION:** From time to time, **Coleman Health Services** will list donors who are members of our *Legacy Society* in various publications such as the *Annual Report to the Community* or make such listings on our website. By doing so, you may encourage others to follow your lead and example, think about the possibilities unique to their own circumstances, and make similar provisions to **Coleman Health Services** in their own estate plans. At no time will information about your generous gift, including amount of donation, be released without your prior approval and consent, or if you wish to remain anonymous.

I/We hereby give **Coleman Health Services** my/our permission to use my/our name in conjunction with any publicity or publication, including press releases or donor recognition listings.  Yes  No

Signature

(your name as you wish to be recognized as a Coleman Health Services Legacy Society member)

It is my/our intent to notify **Coleman Health Services** if I so choose to modify the intent of this Gift Planning document at any time

Signature

Date

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Thank you in advance for your thoughtful support of **Coleman Health Services** which will help us confidently face the opportunities and challenges of the future. Your belief in our mission – *fostering recovery, building independence and changing destinies* for those challenged by mental illness, homelessness and addiction – makes you our partner in hope. We are truly grateful to count you among the Coleman family.

Gift Officer/Donor Relationship Manager

Date

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VP of Development & Marketing

Date

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Please fill out the form below using a ballpoint pen.

## Planned Giving Worksheets for Professional Advisors

Financial and legal advisors are vital to creating and securing deferred gift commitments that benefit **Coleman Health Services**, a 501(c)3 nonprofit headquartered in Kent, Ohio (Portage County). The Resource Development team recognizes that professional advisors representing our donors must follow many ethical and legal guidelines and laws when drafting gift agreements and discussing such matters in confidence with your clients. We understand that trust and confidentiality of these agreements is held inviolate unless the client intends to share this information with their designated beneficiaries.

Often, nonprofit organizations like **Coleman Health Services** do not know about a planned gift until after the donor has passed away. This makes it difficult for us to completely understand and carry out the donor's intentions unless explicitly spelled out in their arrangements. Even then, it is sometimes a challenge for us to carry out their final wishes, mostly due to unanswered questions that may arise.

There is certain information that would greatly facilitate Coleman in helping us use our donor's generous gifts in the manner they intend, whether they choose to disclose to us their identity or not. Therefore, we ask your help in providing this informational-only Gift Planning Worksheet that will provide us with the vital information we need when your client/our donors include **Coleman Health Services** in their estate plans

Name of donor/client: \_\_\_\_\_

Street address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Birthdate for valuation purposes: (Month/Date/Year) \_\_\_\_\_

**Recognition:** (How your client wishes their name(s) to be recognized as a Coleman Health Services Legacy Society member)

**Anonymity:**  Yes  No

**Donor Intent:** In discussing with your client their intentions in making a gift to support Coleman Health Services, it may be necessary to speak with the Resource Development team to ensure the program/area of support is in line with Coleman's strategic priorities and mission. This may require further discussion between you, your client/our donors as we wish to honor their intentions while planning the growth and future of our organization

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**DESCRIBE INTENT:**

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Do you anticipate any additional costs may be incurred by Coleman Health Services upon acceptance of this gift after death (i.e. real estate or property tax payments, property site evaluations or appraisals, insurance premiums, sale of closely held stock, etc.)? If so, please explain:

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Are there any joint owners or beneficiaries pertaining to the gift? If so, please describe:

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Are there any stipulations on the gift that we need to be aware? If so, please explain:

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Is this gift contingent upon any particular qualifying event, other than death?  Yes  No

Do you have an approximate value for the gift? If so, what?

Type of gift vehicle:

(trust, beneficiary designation, etc.)

Can you disclose the executor or other close family member we may contact for further clarification on the donor intentions?  Yes  No

**If so, please provide the following contact information:**

**Executor/next of kin:**

Name:

Address:

City:

State:

Zip:

Phone:

Email:

**Your information:**

Name:

Title:

Firm:

Address:

City:

State:

Zip:

Phone:

Email:

I wish to be recognized as a Preferred Professional Advisor for Coleman:  Yes  No

**If you, your family, or your advisor/attorney would like more information, please contact us at (330) 676-6876 or [HowToHelp@colemanservices.org](mailto:HowToHelp@colemanservices.org).**



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