



goodness *village*

Stock & IRA Distributions

GIFTS OF STOCK

You can make an impact on the lives of the families Goodness Village serves by donating stock, securities, and mutual fund shares. This type of gift is simple and offers you valuable financial benefits as well as supports our guests:

- You can donate appreciated stocks, bonds or mutual funds
- The total value of the stock upon transfer is tax-deductible
- There is no obligation to pay any capital gains taxes on the appreciation

To transfer stock to Goodness Village, please use the following routing instructions:

Delivery to DTC Clearing 0075

LPL Financial

Goodness Village account #: 30897431

Goodness Village Simmons account #: 135209783

Simmons routing #: 082900432

RE: Goodness Village -Donation Account

In order to accurately value your gift to Goodness Village, **please call 501-530-0095 the day the stock is transferred** to the above referenced account. For assigning the value of the contribution, Goodness Village will use the average of the high and low price for the stock on the day it reaches our account. In addition, our policy is to sell the stock as soon as it appears in our account and invest it immediately according to our investment policy statement.

IRA QUALIFIED CHARITABLE DISTRIBUTIONS (QCDs)

Individuals who are aged 70½ or older are able to make gifts from their taxable IRAs directly to Goodness Village instead of personally taking their required minimum distribution (RMD) which can increase annual taxable income. Anyone over the age of 73 is required to take a minimum distribution - whether the funds are wanted or needed. QCDs enable individuals to meet their RMD by a direct transfer of up to \$100,000 from their IRAs to Goodness Village. For a QCD to count toward the minimum annual distribution it must be made by December 31st of that taxable year.

Goodness Village is an IRS Code 501(c)(3) organization, Federal Identification #84-3284848. All gifts to the organization are tax deductible as allowed by law.

QUESTIONS? EMAIL BROOKE@GOODNESSVILLAGE.ORG OR CALL 501-416-3995



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Bequests

BEQUESTS

For many donors, the most significant gift they ever choose to make is through their will or living trust. You can include Goodness Village in your estate plans through a specified dollar amount or percentage of your estate.

BENEFICIARY DESIGNATIONS

You may choose to support Goodness Village through the flexibility of a gift made via a beneficiary designation. The following assets all have the ability to be designated, and you may choose the exact percentage you wish Goodness Village to receive:

- IRAs and retirement plans
- Life insurance policies
- Donor Advised Funds

A beneficiary designation can be completed in a matter of minutes. It is as simple as requesting a change-of-beneficiary form from your policy administrator or downloading the form from your provider's website. You then make your desired changes and return the form to establish your gift.

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Sample Bequest Language

PERCENTAGE OF ESTATE:

"X percent shall be designated to GOODNESS VILLAGE, whose current address is 11610 Pleasant Ridge Road, STE 103-174, Little Rock, AR 72223 to be designated for _____ purpose(s)."

SPECIFIED DOLLAR AMOUNT:

"\$XXX,XXX shall be designated to GOODNESS VILLAGE, whose current address is 11610 Pleasant Ridge Road, STE 103-174, Little Rock, AR 72223 to be designated for _____ purpose(s)."

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MEMBERSHIP FORM

THE CAROLYN JOHNSON LEGACY SOCIETY



In recognition of my/our strong belief and confidence in the work of Goodness Village, I/we confirm that I/we have made a bequest or other planned gift to the organization through my/our estate.

Donor First Name(s)

Donor Last Name

Address :

City :

State :

Zip Code :

Phone :

Mobile Phone :

E-Mail :

DONATION INFORMATION

I/we have made a provision for Goodness Village in my/our estate plans to support the mission of the organization to provide affordable apartment housing in Little Rock, AR for patients and their families who require outpatient medical treatment: (Please check as many as apply.)

- ☐ A stated gift in my/our will or living trust
- ☐ A percentage of my/our estate or residual estate
- ☐ As beneficiary or partial beneficiary of the asset indicated below:

☐ IRA or other retirement plan☐ Donor Advised Fund☐ Life insurance policy☐ Other asset _____

I/we request the funds be used for the following:

- ☐ Unrestricted support
- ☐ Family Support Fund

Estimated value of gift to Goodness Village: \$ _____

☐ I/we wish for my/our membership in the Carolyn Johnson Legacy Society to remain anonymous.

☐ I/we may be recognized in publications for my/our membership in the Carolyn Johnson Legacy Society.

Date _____ Signature _____

This form is non-binding and does not constitute a legal promise of any future donation to Goodness Village.

Please return this form to: Goodness Village, 11610 Pleasant Ridge Road, STE 103-174, Little Rock, AR 72223