

Ways to Give

Join Our Planned Giving Circle



In March 2017, Rehabilitation Institute of Chicago (RIC) became Shirley Ryan AbilityLab — a new, state-of-the-art research hospital that integrates researchers and clinicians in the same physical space, allowing for real-time collaboration. This “cross-pollination” of discipline and expertise leads to better patient outcomes and more complete recoveries.

Thank you for your interest in learning more about making a special gift to Shirley Ryan AbilityLab. Your gift will help sustain and enhance a wide variety of programs, all of which bring the hospital’s world-class resources into the broader communities we serve. We are deeply grateful for your support and belief in our mission and vision.

There are many ways you can make a gift that also:

- Complements and supplements your current and future financial and wealth-transfer goals;
- Expresses your gratitude or appreciation to our clinicians and scientists;
- Creates an enduring legacy, connecting you with our mission and vision in perpetuity.

As you consider these ideas, please know that our Advancement Team has extensive gift-planning expertise and is available to talk with you (and your advisors, if you wish) to plan a gift that ultimately aligns with your personal values, planning needs and charitable aspirations. We would be honored to partner with you on this journey. With your gift, you will be recognized as a member of our

Planned Giving Circle.

For more information, or to begin a confidential conversation, please contact **Julie Captain** at 312.238.8083, or jcaptain@srilab.org.

WHAT’S INSIDE

| | |
|---|--------|
| Bequest Provisions Through Your Will/Trust | Page 3 |
| Donor-Advised Funds | Page 3 |
| Charitable Gift Annuities: Make a Gift and Receive Income | Page 4 |
| Retirement Assets | Page 4 |
| Insurance | Page 5 |
| Gifts of Real Estate | Page 5 |

FAST FACTS

- #1 ranking by *U.S. News & World Report* every year since 1991 —that’s 32 years in a row
- Operate a 262-bed hospital in the heart of Chicago
- Treated 50,000+ patients from nearly every state in the nation, and received referrals from more than 40 countries
- Offer more than 30 additional sites of care, including inpatient, outpatient and DayRehab Centers®
- Offer the world’s only translational research (applied-science) labs — five labs differentiated by functional (or “ability”) focus
- Awarded 4 consecutive Magnet Designations for Nursing Excellence — achieved by only 2% of all U.S. hospitals
- Conducting more than 200 clinical trials and research studies in neuroscience, bionics, robotics and musculoskeletal medicine, among others
- Serves as academic home to Northwestern University Feinberg School of Medicine Department of Physical Medicine & Rehabilitation and primary clinical partner of Northwestern’s McCormick School of Engineering
- Won 27 local, national and international design and architecture awards for our new research hospital





"After my teenage son, Alex, sustained a spinal cord injury, we wanted to give him the best chance for recovery. So, we traveled from Arizona to Shirley Ryan AbilityLab. For two summers, he did outpatient therapy. Commuting, or paying for hotels, was out of the question, and we were not leaving Alex's side. During both summers, our family was blessed with housing at Shirley Ryan AbilityLab Place in the nearby Ronald McDonald House. I can't even express how grateful we were then, and will always be. In return, we would like our estate to help ease this huge burden for other out-of-town families."

— Dorothy, Alex's mom

BEQUEST PROVISIONS THROUGH YOUR WILL/TRUST

Many individuals find comfort in knowing precisely how their estate will be distributed after death. You can designate all or a portion of your estate to benefit family, friends and charitable organizations. This option allows you to make significant gifts to the causes that are important to you without making financial sacrifices during your lifetime.

To make a charitable provision for Shirley Ryan AbilityLab, you and your attorney may want to consider using the language below in your will or trust. Alternatively, if you recently updated your estate plans, we can provide a codicil form that you and your attorney may want to use to supplement your existing plans.

"I give and bequeath \$_____ or ____% of my estate to the Rehabilitation Institute of Chicago d/b/a Shirley Ryan AbilityLab, an Illinois not-for-profit corporation, as an unrestricted gift."

OR

"I give and bequeath \$_____ or ____% of my estate to the Rehabilitation Institute of Chicago d/b/a Shirley Ryan AbilityLab, an Illinois not-for-profit corporation, for the _____ Program, and/or as a gift in memory of/in honor of _____(name(s)). At the time my gift is received, should the Rehabilitation Institute of Chicago d/b/a Shirley Ryan AbilityLab have no program for patient care, research, or education related to _____Program, my gift may be used to provide support for the Rehabilitation Institute of Chicago d/b/a Shirley Ryan AbilityLab's greatest need(s) as determined by the President and CEO of the Rehabilitation Institute of Chicago d/b/a Shirley Ryan AbilityLab, in consultation with the Chair of the Board of Directors."

Legal Name:

Rehabilitation Institute of Chicago
d/b/a Shirley Ryan AbilityLab
355 East Erie Street
Chicago, Illinois 60611

Tax ID#:

36-2256036

Should your plans include restricting your gift to a particular program, please call our office to discuss. We want to ensure that your gift-restriction language is accurate and that Shirley Ryan AbilityLab can steward your wishes appropriately in the future.

After you have completed your bequest, please notify our Advancement Team, so that we can thank you personally for your foresight and include you as part of our **Planned Giving Circle**.

DONOR-ADVISED FUNDS

- **Outright Gifts:** More than 250,000 Americans have opened donor-advised funds (DAFs) to maximize their philanthropic impact on the charities they love and take immediate and full advantage of the tax benefits available to them. This option also allows donors to distribute their gifts to the charities they choose on the timeline they choose. If you are one of those donors, know that Shirley Ryan AbilityLab welcomes distributions of all sizes from DAFs.

- **Legacy Gifts:** Additionally, another common giving option is a legacy gift. In this arrangement, donors can designate a charity to serve as the ultimate beneficiary of their DAF. To choose this option, check with the sponsoring organization of your DAF to inquire whether you can designate Shirley Ryan AbilityLab as a partial or sole beneficiary of your DAF. This special type of DAF gift will extend your legacy for generations, and, upon notification of your designation, Shirley Ryan AbilityLab will celebrate your generosity forever.

CHARITABLE GIFT ANNUITIES: MAKE A GIFT ... AND RECEIVE INCOME

Many donors want to make a sizable gift, but would feel more confident and comfortable if there were a way to retain the income generated by the asset they intend to donate.

Fortunately, through life-income gifts, donors can make a gift, potentially enjoy a current tax deduction and secure a fixed or variable source of income for themselves or others for a term of years, or for the remainder of their lives.

In addition to giving cash, funding a life-income gift with highly appreciated securities (e.g., publicly traded stocks) can provide additional benefits by minimizing any capital gains taxes. Our team would be happy to discuss your personal situation with you and your advisor, and then recommend the best vehicle for achieving your goals.

RETIREMENT ASSETS

Retirement assets, including IRA or 401(k) assets, can fund outright gifts (for donors 70 ½ years of age and older), as well as deferred gifts, both options offering highly attractive tax benefits. Often, individuals are surprised to see that the value of their retirement plans has grown substantially, and that the increased value can be used philanthropically. Donors can put their required minimum distribution to good use, while also avoiding payment of income tax on the withdrawal or the excise tax penalty for skipping.

- **Outright Gifts:** Donors 70 ½ years of age or older can make direct, outright gifts from their IRAs to Shirley Ryan AbilityLab. Considered Charitable IRA Rollover gifts, these transfers are easy for donors. Simply contact your IRA custodian to authorize your rollover gift, up to \$100,000, per nonprofit organization per year. Donors avoid paying income tax on the withdrawal from their IRA account, and therefore, are not eligible for a charitable gift deduction. For donors 73 and older, this gift may also qualify as one's required minimum distribution. For assistance, contact our office for additional support.
- **Legacy Gifts:** Donors at any age can also name Shirley Ryan AbilityLab as a beneficiary of their retirement asset, for a specific dollar amount or percentage. This type of testamentary gift ensures that the donor can use their retirement assets during his or her lifetime and also make a gift that extends his or her legacy. To make this kind of gift, simply contact your retirement asset custodian and request a beneficiary designation form and then update it.





INSURANCE

Insurance is an important financial and estate-planning tool that can also be a powerful partner in charitable gift planning. Paid insurance policies can be effective assets to donate as a charitable gift. Plus, in many gift-planning scenarios, donors can use insurance to replace and preserve wealth for heirs, thereby replacing the value of the asset the donor contributed.

GIFTS OF REAL ESTATE

Real estate often comprises a large portion of a person's estate. Nearly all types of real estate can be contributed: your primary residence, a vacation home, undeveloped land, a farm or commercial property. Donors receive the best tax treatment when the property is clear of any debt. There are also ways for you to give your home, retaining the right to live in it during your lifetime — and all while potentially enjoying current tax benefits.

If you are considering a gift of real property, it is very important to discuss your ideas and intentions with a member of the Shirley Ryan AbilityLab Advancement Team prior to entering into any gift transaction. This discussion is critical to make sure your gift is one that Shirley Ryan AbilityLab can receive and properly steward. Additionally, all gifts of real property are subject to review and formal acceptance by the hospital's CEO and Board of Directors Chair. We respectfully reserve the right to decline a gift of real property that is deemed too burdensome or costly to manage.

LET US HELP YOU PLAN YOUR GIFT

There is no time like the present to consider how you can make a charitable investment in helping Shirley Ryan AbilityLab. By leveraging the benefits of these gift-planning vehicles, anyone can be a philanthropist — and anyone can help support Shirley Ryan AbilityLab as we help our patients achieve better outcomes, faster.

Members of our Advancement Team are ready to assist you and your team of advisors in planning your unique gift — a gift that will create an enduring legacy, meet your personal and family financial and estate-planning goals — and ultimately, make a remarkable difference in the lives of patients, today and for years to come.

THANK YOU FOR YOUR CONSIDERATION

With your gift, we can ensure that all patients have access to resources that will help them achieve better outcomes — here in Shirley Ryan AbilityLab and beyond.

We invite all donors who have made any type of gift referenced in this document to be a part of our **Planned Giving Circle**. Please contact our Advancement Team to share information about your gift so that we can thank you, honor you and include you as a special member of our family moving forward. Your commitment to Shirley Ryan AbilityLab represents a lasting legacy that we will honor for years to come.

We thank you for thinking of us and for your consideration.

For more information, or to begin a confidential conversation, please contact:

Julie Captain, CFRE, CAP®

Senior Director, Office of Advancement

312.238.8083

jcaptain@sralab.org



This information is provided as general, educational information and should not be construed as legal advice. Please check with your attorney on how these topics apply to your personal situation.



355 East Erie Street | Chicago, IL 60611 | sralab.org