



Ronald McDonald  
House Charities®  
Atlanta



*How will you be remembered?*



We strengthen families by keeping them together when they need it most. But we cannot do it without you!

**Make a difference in the lives of seriously ill or injured children by planning a legacy gift and ensure Atlanta RMHC can support families for years to come.**

With a little planning and a big heart you can transform lives like the Morrisons and the Roeschs, members of **Atlanta Ronald McDonald House Charities' Legacy Circle.**

"Our long association with the Ronald McDonald House has been rich and rewarding. With our planned gift, we wanted to help ensure the important work of this very worthy charity continues well into the future."

— **Kathy and Bob Morrison**



"We have seen firsthand the immediate and lasting impact Atlanta Ronald McDonald House Charities has on children and their families. It is a wonderful feeling to know that a portion of our family trust, from our life's blessings, will help carry on this important and compassionate mission."

— **Nancy and Jeff Roesch**



# Gift and Estate Planning for Today and Tomorrow

Here are some of the easiest and most common ways to begin planning your legacy. For more information on these and other planned giving opportunities, or to develop a charitable plan that meets your goal, contact **Marissa Greider**, Senior Director of Major and Planned Gifts, at 678.704.8088 or [marissa.greider@armhc.org](mailto:marissa.greider@armhc.org).

YOUR GIFT	Bequest	Retirement Plan Assets 401(k), 403(b), IRA	Life Insurance Beneficiary at Death	Life Insurance Transfer of policy ownership to Atlanta RMHC	Donor Advised Fund DAF	Charitable Remainder Trust CRT	Charitable Lead Trust CLT
YOUR GOAL	<ul style="list-style-type: none"><li>Maintain control of your assets during your lifetime with a gift to support Atlanta RMHC at your death</li></ul>	<ul style="list-style-type: none"><li>Continue withdrawing funds during lifetime</li><li>Can change mind if situation warrants</li><li>Satisfaction of knowing hard-earned money will benefit others</li><li>Reduced taxes on your IRA required minimum distribution</li></ul>	<ul style="list-style-type: none"><li>Make a more significant gift to Atlanta RMHC at your death</li><li>Reduce estate tax</li></ul>	<ul style="list-style-type: none"><li>Make a significant gift to Atlanta RMHC at your death</li><li>Be honored for a guaranteed gift</li><li>Reduce estate tax</li><li>Receive a tax benefit from a charitable deduction</li></ul>	<ul style="list-style-type: none"><li>Centralize giving during your lifetime through a Charitable Savings Account</li></ul>	<ul style="list-style-type: none"><li>Transfer your appreciated property without paying capital gains tax</li><li>Enjoy regular income for life or a term of years</li><li>Receive a tax benefit from a charitable deduction</li></ul>	<ul style="list-style-type: none"><li>Give cash to your family in the future</li><li>Avoid substantial gift or estate tax</li><li>Provide funds to Atlanta RMHC during your lifetime</li></ul>
HOW IT WORKS	<ul style="list-style-type: none"><li>Designate Atlanta RMHC as a beneficiary of your estate by will, trust or other instrument</li><li>Your legacy gift can be a specific asset, specific dollar amount or a percentage of your estate</li></ul>	<ul style="list-style-type: none"><li>Name Atlanta RMHC as primary, partial or contingent beneficiary OR</li><li>If you are age 70 1/2 or older, you may also make a gift to Atlanta RMHC from your required minimum distribution</li></ul>	<ul style="list-style-type: none"><li>Name Atlanta RMHC as beneficiary of your life insurance policy</li></ul>	<ul style="list-style-type: none"><li>Transfer ownership of your life insurance policy to Atlanta RMHC, while you remain the insured</li><li>Atlanta RMHC is beneficiary at your death</li><li>You make tax-deductible annual contributions to Atlanta RMHC each year in the amount of the policy premiums</li></ul>	<ul style="list-style-type: none"><li>Transfer cash, appreciated securities or other assets to a DAF and recommend grants at your discretion to Atlanta RMHC</li><li>Gifts may be made today</li><li>You may also name Atlanta RMHC as a beneficiary of residual proceeds after death</li></ul>	<ul style="list-style-type: none"><li>Transfer your assets to fund a charitable trust that pays one or more designated beneficiaries a fixed amount, typically for life, then the balance to Atlanta RMHC</li></ul>	<ul style="list-style-type: none"><li>Transfer your assets to fund a lead trust that makes a gift to Atlanta RMHC for a number of years</li><li>You receive a charitable deduction for the gift</li><li>Your family receives the remainder at substantial tax savings</li></ul>
YOUR BENEFITS	<ul style="list-style-type: none"><li>Simplest way to remember those you care about</li><li>Flexible</li><li>Revocable during your lifetime</li><li>Charitable estate tax deduction</li></ul>	<ul style="list-style-type: none"><li>Use of benefits during lifetime</li><li>Charitable estate tax deduction</li><li>Dependents avoid ordinary income tax assessments on amount paid to Atlanta RMHC</li><li>Reduce taxes you would otherwise pay when taking your required minimum distribution</li></ul>	<ul style="list-style-type: none"><li>Value of insurance policy avoids estate tax</li><li>Make a more significant gift</li><li>Maintain ownership of policy</li><li>Beneficiary designation is revocable</li></ul>	<ul style="list-style-type: none"><li>Charitable tax deduction for donated premium</li><li>Value of insurance policy avoids estate tax</li></ul>	<ul style="list-style-type: none"><li>Charitable tax deduction at time of gift</li><li>Contribute to Atlanta RMHC at your discretion</li><li>Centralizes giving and record-keeping</li></ul>	<ul style="list-style-type: none"><li>Charitable tax deduction</li><li>Income for life or a term of years</li><li>Possible income growth over time</li><li>Avoidance of capital gains tax</li></ul>	<ul style="list-style-type: none"><li>Gift or estate tax deduction</li><li>Asset and appreciation passes to family at a reduced or no gift tax cost</li></ul>

# Atlanta RMHC's mission is to nurture the health and well-being of children and families.

Keeping families close when they need it most through:

- 2 Ronald McDonald Houses near Egleston and Scottish Rite, totaling 81 guest rooms
- Ronald McDonald Family Room at Scottish Rite, supporting childhood cancer patients and their families
- Ronald McDonald Care Mobile delivering asthma treatment to local school children
- Betty Lou, our certified therapy dog

Together these programs transform the lives of more than 3,200 families annually.

Your legacy gift ensures the continuation of these programs and more, advancing the health and well-being of future generations.

We are honored to recognize donors who have named Atlanta RMHC in their will or estate plans as members of our Legacy Circle.



**RMHC**  
Atlanta

Keeping families close™

## Marissa Greider

*Senior Director of Major and Planned Gifts*  
Atlanta Ronald McDonald House Charities

795 Gatewood Road, NE

Atlanta, GA 30329

678.704.8088 • [marissa.greider@armhc.org](mailto:marissa.greider@armhc.org)

EIN 58-1295754

