

SECURE

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INVESTING IN THE FUTURE

SECURE® is a planned giving newsletter published semi-annually by The Arc of the United States.



Ron's Journey: From Supporting His Family to Supporting The Arc

How You Can Do The Same



Ron Brown's involvement with The Arc started by asking for help.

Ron's daughter, Felicia, was two and a half years old when diagnosed with a developmental disability as a result of cancer treatment. Ron and his family were desperate for guidance as they began the journey of navigating an unfamiliar path securing resources and community supports for Felicia.



Ron reached out to The Arc of the Capital Area in Austin, Texas for information and referral services to support Felicia. His motivations were initially just to help his family — he sought advice on how to secure a future for his daughter. As Ron's family received vital information and support from his local chapter, he began to realize that there were many other families in the same situation who would benefit from help, just like his.



"The Arc helped me, knowing families were out there that have traveled the same road that I had to travel. I became interested and concerned about how other families were being supported . . . and how I could

give back."

Ron's desire to support this community and ensure that The Arc could continue to provide services to families like his led him to take on progressively significant leadership roles. After becoming increasingly involved in his state, he eventually became President of The Arc of Texas and is now finishing his term as immediate Past President of The Arc's National Board of Directors.

After holding positions at so many levels within the organization, Ron knows how important it is for The Arc to thrive at the national level, supporting the work of state and local chapters so they can continue to advocate and be there for future generations.

"The people we serve will always be there. If we are not there to help facilitate, advocate, and demand supports and services, they will be left behind. If we at the national level do not support our organization at a state level and then locally, we lose the power that it takes for all of us to be successful. We have to develop the tools and resources that drive our state and local efforts."

Ron's daughter Felicia recently passed away; however, the dire need for support in families like his continues to be a driving force for his advocacy and contributions to the organization.

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Has Your Estate Plan Kept Up with your Life

The Importance of Reviewing your Special Needs Estate Plan

By Frederick M. Misilo, Jr., Esq.

Many changes occur in our lives. Your estate plan should be reviewed on a regular basis to keep up with those changes.

Reviewing your estate plan every three to five years ensures that your fiduciary selections remain appropriate, newly acquired assets are incorporated into your estate plan, your special needs trust is up to date with any changes in laws and regulations, your estate plan remains appropriate to minimize estate taxes on all levels, and the distribution of your assets represent your current intentions. Estate plans include a will, trusts, durable power of attorney for property, and a health care proxy. These documents should reflect your best judgment on issues such as how your assets will be distributed, selection of persons to serve as fiduciaries, and how the remaining assets of the special needs trust are to be distributed upon the passing of the beneficiary.

A special needs trust is
key to your estate plan.
Administered over

the lifetime of the beneficiary, it preserves government benefit eligibility, provides supplemental services and supports to the beneficiary not provided by government-funded resources, pays for advocacy and generally enhances the beneficiary's quality of life. Upon the death of the beneficiary, the remaining assets of the special needs trust are distributed according to the terms of contained in the trust. Your estate should also provide guidance if your child with special needs predeceases you. In this case, the special needs trust incorporated into your estate may no longer be required.

Often, the decision of how the remaining assets are to be distributed upon the death of the beneficiary is not fully considered. A common default provision in trusts is to distribute the remaining assets to family members. However, this is also an opportunity to recognize charitable entities such as The Arc whose mission is in line with the values of your family. Failure to consider naming The Arc as a remainder beneficiary of a special needs trust is truly a missed opportunity, as doing so ensures the sustainability of The Arc's vital work.

For more information about how you can leave a lasting legacy and support The Arc, please contact The Arc's Development Department at plannedgiving@thearc.org or 202.534.3713.

Frederick M. Misilo, Jr., Esq. (fmisilo@fletcherilton.com) is a trust and estate and special needs attorney who practices law in Florida, Massachusetts, and Rhode Island. He is also on the Board of Directors of The Arc of the United States, Inc. and is a past President of The Arc of Massachusetts, Inc.

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Ron knows that a family's future planning, which can include supporting your favorite charities as part of a bequest, can ensure the sustainability of The Arc's future. Changes happen throughout our lives, and it is important to have conversations — as difficult as they can be — to ensure family trusts and other planned giving vehicles are up-to-date. Upon the death of a beneficiary, the remaining assets can be donated towards organizations like The Arc.

The Arc has been with Ron and his family throughout their journey with their daughter, sharing successes as well as supporting them during times of hardship. While the family's initial financial plans had to be altered, they take comfort in the fact that they can give back and help The Arc, which has helped them so much. They encourage others to do so as well to protect the future of The Arc for generations to come.

For more information about making a planned gift to The Arc, please contact The Arc's Development Department at plannedgiving@thearc.org or 202.534.3713.



The Arc's Public Policy and Advocacy Efforts

The Arc's national office works to protect critical programs and services for people with intellectual and developmental disabilities and their families through our federal public policy and advocacy efforts. We partner closely with our network of over 650 chapters to engage activists, mobilize new supporters, share stories, and much more to show the power of the disability community.

Last year, our work together helped defeat legislation that would have devastated the Medicaid program. This year, The Arc will continue to call on all advocates to grow our movement to protect the essential programs and civil rights laws which help make community living possible.

To learn more about The Arc's advocacy & ways to take action, visit: disabilityadvocacynetwork.org

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Ways to Give to The Arc

In addition to a planned gift, here are 3
different ways to make a gift to The Arc now!



*Give the gift of stock,
bond, or mutual fund.*



*Donate your car, van, truck,
boat, or RV through The Arc's
Car Donation Program.*



*Make a difference every month
by becoming a monthly donor!*

To learn more, visit:
thearc.org/get-involved/ways-to-give



bbb.org/charity

The BBB Wise Giving Alliance National Charity Seal carries a lot of meaning for both donors and charities. After undergoing a rigorous evaluation by the BBB Wise Giving Alliance, The Arc is proud to have received their seal for meeting the Standards for Charity Accountability!



Achieve with us.®

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