



**PPHP 1933
Legacy Society**

For individuals
who have included
PPHP in their
estate plans.
www.pphp.org

**Planned Parenthood Hudson Peconic
Ensuring Choice for Future Generations**

PPHP & Year-End Planning Ideas

In early 2013, Congress passed the American Taxpayer Relief Act (ATRA) as part of a bipartisan effort to avoid federal budget issues.

Almost every taxpayer has been affected in some way by this law. In light of ATRA, you may want to take time this fall to reexamine both your personal and charitable financial goals.

Time spent considering your priorities is well worth the effort. You may be able to take advantage of tax planning opportunities, savings and other welcome benefits while maximizing your charitable gifts to Planned Parenthood Hudson Peconic (PPHP) and other organizations.

Making a charitable gift to PPHP can be an excellent way to support a cause that is important to you and possibly reduce your taxes.

Use the law to your benefit

When considering plans for the remainder of 2014, it is important to keep in mind that many tax deductions, including mortgage interest and property

taxes, are influenced by loan terms and other factors beyond your control. Your charitable gifts to PPHP, on the other hand, are completely under your control.

With careful gift planning, you may be able to make special gifts to PPHP while reducing taxes owed for this year. Those with higher tax rates will experience greater savings. To maximize your tax deductions, complete your gifts by December 31.

Prepare now for the future

You may also wish to review your long-range financial and estate goals as you look toward 2015. Through thoughtful planning today, you can help ensure economic security for yourself and your loved ones while still fulfilling your charitable goals.

In this newsletter we share helpful ideas you may wish to consider as you address your plans for this year and next. We will be pleased to share additional information with you or your advisors with no obligation upon request.

In This Issue

- Tips and ideas for year-end planning and charitable giving
- The benefits of making a gift of securities to PPHP
- Spotlight on PPHP Education: CAPP teens create a virtual tour of the New Rochelle Health Center
- Making a gift to PPHP through your will—guidelines and sample language

For information about the **1933 Legacy Society** please contact:

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PPHP's Mission

To empower individuals to determine their own sexual health and reproductive futures

PPHP's Role

With cultural sensitivity to all communities, provide exceptional health services, accurate information and education, and fearless advocacy for reproductive rights and justice.

You Can Help

Volunteer your time.

Donate to our Thrift Shop.

Sign a petition.

Make a gift.

www.pphp.org/donate

Making a Gift of Securities to PPHP

Should you wish to make a charitable gift to Planned Parenthood Hudson Peconic (PPHP) before the end of the year, you may want to consider a gift of securities.

Benefits of giving securities

As you consider your gifts this fall, keep in mind that certain assets owned for more than one year are generally deductible at their full current value. Specifically, this can include assets such as stocks and mutual funds that are currently worth more than you paid for them.

When you give these assets, you can deduct not only what you paid for the property, but also any "paper profit" or gain in the investment. In addition to regular tax savings, you may also be relieved of capital gains tax that would otherwise be due on a sale of the donated assets.

An example

John and Kathy normally make charitable gifts to PPHP in the form of cash. This year they chose to give stock that had increased in value. They were able to deduct the full value of the stock while completely bypassing capital gains tax. See the chart at left for more details.

Secure stock value while making gifts

Laura owns securities that are worth significantly more than she paid for them. She believes they may continue to increase in value but is not sure. Instead of giving cash, Laura decides to make a gift to PPHP using these securities. She is entitled to a tax deduction for their full value.

Laura used the cash she had originally set aside for giving to repurchase the same number of shares at the current market price. She now owns the same number of shares as before, but she has effectively locked in a new, higher cost basis. Additionally, she was able to forego the tax on the increase in value prior to the time of her gift.

If the new shares increase in value, Laura will have less gain to report when she eventually sells the stock. If their value declines, she may be able to deduct the loss for tax purposes.

Giving securities can be simple

In most cases, the gift is easy to complete. Simply instruct your financial advisor to transfer the stock to PPHP's account.

Check with us or your advisors for more information about tax-favored gifts of securities and other assets.

Example of \$10,000 gift

	Sell Securities and Give Cash		Give Securities	
Asset Value	\$10,000		\$10,000	
Cost	\$4,000		\$4,000	
Taxable Gain	\$6,000		\$0	
Capital Gains Rate	20%		0%	
Capital Gains Tax	\$1,200	Net Tax Savings \$2,760	\$0	Net Tax Savings \$3,960, 31% Greater
Amount of Gift	\$10,000		\$10,000	
Income Tax Rate	39.6%		39.6%	
Income Tax Savings	\$3,960		\$3,960	
Net Tax Savings	\$2,760		\$3,960	
Number of Transactions	2		1	

PPHP Spotlight on Education: Teens Create “Virtual Center Tour”

Who could possibly connect with teens about sexual health and relationships better than other teens?

That was the idea that inspired Planned Parenthood Hudson Peconic (PPHP) earlier this year, as part of the Comprehensive Adolescent Pregnancy Prevention (CAPP) Program, to bring together dozens of teens to produce public service announcements aimed at, who else, other teens! The PSAs focused on healthy relationships and the importance of using condoms and were featured on social media and the PPHP website.

The health center experience

This fall, PPHP coordinated a new group of teens to create another video in the series—a virtual tour of a Planned Parenthood health center! On September 7, ten teens from the CAPP program filmed a virtual center tour at PPHP’s New Rochelle Health Center.

The video depicts a complete and accurate PPHP health center experience from the check-in process, explanation of services, Family Planning Benefit Program (FPBP), clinician consult, all the way through to check out. The plot even includes elements of intrigue with several “teen drama” moments in the style of a soap opera.

The group began filming early in the morning at the New Rochelle Health Center and finished at the Boys and Girls Club of New Rochelle for the outdoor scenes. There were many hugs, high-fives, lots of selfies and some tearful goodbyes. Everyone was exhausted but extremely excited about what they accomplished!



The virtual tour, and the previous PSAs, will be promoted on PPHP’s web site and on social media by the next group of CAPP participants in November. As part of the project, teens will work with MyMediaLife,

which produces social media marketing campaigns created by the populations they are designed to reach. They will learn how to use new media to deliver a message to other teens about sexual health.

These videos are encouraging thousands of teens to evaluate and change their behavior, and educating them about the services available at Planned Parenthood. We couldn’t be prouder of all our participants. You can watch the videos at www.pphp.org.

PPHP Locations

Suffolk County

755 New York Avenue
Huntington, NY
(631) 427-7154

450 Waverly Avenue
Patchogue, NY
(631) 475-5705

550 East Main Street
Riverhead, NY
(631) 369-0230

70 Maple Avenue
Smithtown, NY
(631) 361-7526

180 Sunrise Highway
West Islip, NY
(631) 893-0150

Westchester County

6 Gramatan Avenue
Mount Vernon, NY
(914) 668-7927

175 Tarrytown Road
White Plains, NY
(914) 761-6566

247-249 North Avenue
New Rochelle, NY
(914) 632-4442

20 South Broadway
Yonkers, NY
(914) 965-1912

Rockland County

25 Perlman Drive
Spring Valley, NY
(845) 426-7577

Putnam County

2505 Carmel Avenue
Brewster, NY
(845) 278-7313

Administrative Headquarters

4 Skyline Drive
Hawthorne, NY
(914) 467-7300

Suffolk Regional Office

70 Maple Avenue
Smithtown, NY
(631) 361-7526

Since 1933...

PPHP is proud to honor those that have remembered us in their estate plans with membership in the *1933 Legacy Society*.

The 1933 Legacy Society is named for the year that the first medical center, that would later become Planned Parenthood, opened in Mount Vernon.

Membership benefits include:

- The bi-annual 1933 Legacy Society Newsletter
- Invitations to exclusive special events
- Special recognition in the Annual Report

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Planned Parenthood Hudson Peconic

Making a Gift Through Your Will

Making a gift to Planned Parenthood Hudson Peconic (PPHP) through your will or revocable trust demonstrates your confidence in our mission to empower individuals to determine their own sexual health and reproductive futures. Estate gifts can make a significant difference in the lives of future generations.

A bequest is easy to arrange and will not alter your current lifestyle in any way. It can also be easily modified to address your changing needs. Below is sample language you and your attorney can use or adapt as necessary.

Residual Bequest Language

A residual bequest comes to us after your estate expenses and specific bequests are paid:

I give and devise to Planned Parenthood Hudson Peconic, Incorporated, a not-for-profit organization incorporated by the laws of the State of New York, having as its principal address 4 Skyline Drive, Suite 7, Hawthorne, NY 10532, [all/a percentage] of the rest, residue and remainder of my estate, both real and personal, to be used for its [general support/specific fund or program].

Specific Bequest Language

Naming PPHP as a beneficiary of a specific amount from your estate is easy:

I give and devise to Planned Parenthood Hudson Peconic, Incorporated, a not-for-profit membership organization incorporated by the laws of the State of New York, having as its principal address 4 Skyline Drive, Suite 7, Hawthorne, NY 10532, the sum of [\$ _____] to be used for its [general support/specific fund or program].

Contingent Bequest Language

PPHP can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled:

If (insert name) is not living at the time of my demise, I give and devise to Planned Parenthood Hudson Peconic, Incorporated, a not-for-profit membership organization incorporated by the laws of the State of New York, having as its principal address 4 Skyline Drive, Suite 7, Hawthorne, NY 10532, [all/the sum of \$ _____/a percentage] of my estate to be used for its [general support/specific fund or program].

Customized Language

If you or your attorney would like PPHP to provide you with customized beneficiary language that is specific to your goal and interest, please contact Janet Pollack at (914) 467-7317.

The purpose of this publication is to provide general gift, estate, and financial planning information. It is not intended as legal, accounting, or other professional advice. For assistance in planning charitable gifts with tax and other financial implications, the services of appropriate advisors should be obtained. Consult an attorney for advice if your plans require revision of a will or other legal document. Tax deductions vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states. ©MMXIV RFSCO, Inc. All Rights Reserved. NYDX-14