



Planned Giving News for  
Supporters of ACH Child  
and Family Services

CIRCLE OF LIFE  
**GIVING**  **SOCIETY**



# A Message

FROM WAYNE CARSON, PH.D.

## Dear Friend,

As I pause to write you this note, I'm aware that so much could change just in the time it takes to make its way to your mailbox. We all know too well how quickly things can shift.

After the past several years of one unexpected challenge after another, I'm also keenly aware how vital your partnership is as we look ahead in preparation for whatever needs may arise for the children and families we serve.

A gift to ACH Child and Family Services through your estate is a wonderful way to continue your legacy of protecting children and preserving families long into the future.

In this issue of our *Circle of Life Giving Society* newsletter, Sue and John Allen Chalk share their story of passionate commitment to ACH's mission through service and financial support, including a recent choice to give using IRA required minimum distributions. Benefactors like Sue and John Allen plan their giving strategically so they can give more than they could by simply writing a check.

Should you have questions about giving strategically and/or leaving a legacy through an estate or endowment gift to ACH, please contact Dixie Mullins, our Chief Development Officer, at 817-886-7115 or by email at [Dixie.Mullins@ACHservices.org](mailto:Dixie.Mullins@ACHservices.org).

Thank you for your unwavering commitment to our vision of a community where families thrive and children experience safety, hope and love. It is an honor to partner with you!

Gratefully,



Wayne Carson, Ph.D.  
Chief Executive Officer



## Our Mission

PROTECTING CHILDREN.  
PRESERVING FAMILIES.  
SINCE 1915.

### Board of Directors

Anna Alvarado, *Secretary*  
Toby Ardoyno  
Sarah Bennett  
Henry Borbolla  
Linda Christie  
Katie Ciccarino  
Delynn Crofford  
Tom Harris  
Tim Harvard  
Barry Kromann, *Treasurer*  
Karen Morgan  
Lynn Newman  
Mike Parks  
Savannah Petronis  
Alan Shipman  
Sara Vargas  
Kyle Whitaker, *Chair*

### Foundation Board Members

Rickey Brantley  
Linda Christie  
Chad Cline  
Bob Ferguson  
Melinda Johnston  
Truitt Kimbrough  
Barry Kromann  
Janeen Lamkin  
Fred Moore, *Chair*  
Peter Philpott

### Community Ambassador Advisory Council

Margaret Augustat  
Karen Barlow  
Alysa Dennett  
Vivian Ferguson  
Missy Johns  
Kelly Keller  
Sandi Kennedy  
Barry King  
Cindy Level  
Judy Mayo  
Suzanne Tucker  
Lindy Williams



# SUE AND JOHN ALLEN CHALK: IMPACTING LIVES TODAY AND TOMORROW

Sue and John Allen Chalk have been helping children and families by supporting ACH for more than 20 years — starting when Sue's good friend, Lynn O'Day, asked her to join ACH's Board of Directors.

In the early 2000's, the Chalks chaired the Building Hope Campaign, which raised funds to develop a second campus for ACH in the Wedgwood neighborhood, which in turn helped ACH serve many more children.

Today, Sue continues her involvement as an active member of the Community Ambassadors, a group of former Board and Auxiliary members who are advocates for ACH and its mission.

Throughout their life together, Sue and John Allen have been very intentional about giving to charity. In fact, John Allen says one of the main reasons he continues to work full-time is so the couple can keep giving generously to causes like ACH.

Recently, the Chalks began giving to ACH directly from an Individual Retirement Account (IRA), which allows them to avoid income tax on Required Minimum Distributions (RMDs), while also supporting ACH generously.

Sue shared how simple the process was. Their financial advisor just needed ACH's name and address, and then emailed Sue a document to sign. Not long after that, ACH received the gift.

Alternatively, you can contact your IRA plan administrator and instruct them to make a qualified

charitable distribution — also known as an IRA rollover gift – to ACH.

John Allen suggested another great way to make a planned gift, through a Charitable Remainder Trust (CRT). You can fund a trust with assets such as appreciated stock or cash. That trust is invested and then pays you, or someone you designate, income annually for life or a set number of years. ACH benefits from what remains after all the trust payments have been made.

*If you would like to learn more about how you can make a planned or legacy gift to ACH, please contact Dixie Mullins at 817-886-7115 or visit our gift planning website at [ACHservicesLegacy.org](http://ACHservicesLegacy.org)*



## Beneficiary Designation Gifts

### Make the Most of Your Retirement Plan

Many Americans have saved for retirement using a tax-deferred account, such as an IRA, 401(k) or 403(b). If you own a retirement account, you have probably saved and invested for many years. Have you considered what will happen to your account when you no longer need it? If you give your retirement assets to your children, they may have to pay tax on their inheritance.

### Unused Retirement Assets Can Help Abused Children and Families in Crisis

The good news is that if you leave your retirement assets to ACH, the full value of your gift can help protect children and preserve

families. There are many ways you can use what remains of your retirement assets to make a significant gift.

- You can leave ACH a gift of a specific amount from your IRA, 401(k) or 403(b) or other plan.
- You can leave ACH a percentage of one or more of your accounts.
- You can provide for your family and leave us the remainder.

To name ACH as the beneficiary of one or more of your retirement accounts, contact your plan administrator. Account Administrators make beneficiary designation forms readily available.

# INCREASE YOUR INCOME AND GIVING

## Consider an IRA Rollover to Gift Annuity

Do you own an IRA? Would you like to give more to charity but need the retirement income? Have you considered a charitable gift annuity in the past but weren't ready?

If you answered "yes" to these questions, now is an excellent time to consider a charitable gift annuity with ACH — and the Secure Act 2.0 provides a once-in-a-lifetime way to do so with a **tax-free distribution** from your IRA.

## What is a Charitable Gift Annuity?

A charitable gift annuity (CGA) is a contract between you and ACH. In exchange for your charitable gift, we agree to pay you a **fixed income for your lifetime**. Upon your passing,

the annuity ceases, and the remaining principal is used to further our mission.

### Benefits of a Charitable Gift Annuity

- Lifetime income and financial security
- Attractive payment rates
- Opportunity to support children and families in need

## How does the Charitable Gift Annuity Work?

A charitable gift annuity (CGA) is a simple written agreement signed by you and our organization.

Once you contribute cash from your IRA, the CGA begins to make monthly or quarterly payments to you for your lifetime. The payment rate is based on your age to your nearest birthday.

## What the Secure Act 2.0 Provides

- Once-in-a-lifetime tax-free distribution from your IRA for a gift annuity
- Maximum allowable distribution amount of \$50,000 in 2023
- Lifetime income payments of 5% or greater
- Lowers your taxable estate
- Charitable gift annuities may be set up to pay income to you or your spouse.
- Under the act's provisions, you must be 70 1/2 or older to take advantage of this opportunity.
- A charitable gift annuity is a general obligation of our organization and is backed by all our assets.

For more information about the benefits of gifts of retirement assets or to learn how to designate ACH as a charitable beneficiary, contact Dixie Mullins at 817-886-7115 or [Dixie.Mullins@ACHservices.org](mailto:Dixie.Mullins@ACHservices.org) or scan the QR code below.



*If you plan to include ACH in your plans, please let us know. We'd like to recognize you for your intended gift. If you'd like us to use your gift for a specific purpose, please contact us. We want to honor you and your wishes.*

**Thank you** for considering how you can make ACH Child and Family Services a part of your legacy. As long as there are children and families in need of loving care, your support will ensure ACH will be here to help them.

