

There may be tax benefits to you now or to your estate in the future, depending on the type of gift that you make.



Please return this form in person or mail to:

NAMI Southern Arizona
6122 E. 22nd St.
Tucson, AZ 85711

For more information on planned giving contact:

Christina Bickelmann,
Executive Director
NAMI Southern Arizona
cbickelmann@namisa.org
520-622-5582

About Us

The National Alliance on Mental Illness (NAMI) is the nation's largest grassroots mental health organization dedicated to building better lives for the millions of Americans affected by mental illness. NAMI advocates for access to services, treatment, support and research, and is steadfast in its commitment to raising awareness and building a community of hope for all of those in need.

NAMI Southern Arizona, a local affiliate, helps all those affected by mental illness, including individuals with mental illness and their families, by providing advocacy, education and support. All of our programs are offered at no charge and are available in both English and Spanish.

Our Mission

NAMI Southern improves the quality of life for all those affected by mental illness.

Our Vision

Southern Arizona is a stigma-free community in which abundant resources and support exist to ensure that everyone is healthy in body and mind.



HELP NAMI's
FUTURE GROW



6122 E 22nd St
Tucson, AZ 85711
(520) 622-5582 office

namisa@namisa.org

namisa.org/planned-giving/

*NAMI Southern Arizona is a
501(c)(3) organization - EIN #86-0450977*

*Arizona Charitable Tax Credit
QRC Code 21027*



Planned Giving

**Leave a Legacy of Hope
with your Planned Gift to
NAMI Southern Arizona**

*Serving Pima County since 1983.
NAMI Southern Arizona is a
501 (c)(3) organization and a designated
Arizona Charitable Tax Credit Organization*

Revised October 2022

Giving to our organization helps us sustain our future as well as grow and develop our programs and services.

Planned Giving

Many individuals and families have a very personal connection with NAMI Southern Arizona because of the ways that mental illness has affected our own lives and the lives of people who are important to us. NAMI provides a wealth of knowledge, training, skills, support and friendship through both formal programs and informal networks.

Planned giving through a will, a beneficiary designation on a financial asset, a charitable trust or a charitable gift annuity provides an additional source of funds so that the programs and services that NAMI provides here in Southern Arizona will continue to be available in the future. A planned gift is one that you make by way of a will, beneficiary designation, charitable trust or charitable gift annuity.

There may be tax benefits to you now or to your estate in the future depending on the type of gift that you make.

You may direct your planned gift to “NAMI Southern Arizona” (current operating account) or to the “NAMI Southern Arizona Endowment Fund” (permanent investment account managed by the Community Foundation of Southern Arizona)

What to Give

Here are some examples of the best type of planned gifts:

Cash - It is simple and always a great way to give to NAMI Southern Arizona.

Stocks/Bonds/Mutual Funds - Gifting these assets avoids capital gains taxes for your survivors.

Retirement Assets - If you designate a charity as the beneficiary of all or part of your IRA, 401(k), 403(b), pension or other tax deferred plan (using a beneficiary designation form provided by your custodian), the full value of the gift is transferred tax-free at your death and your estate may receive an estate tax charitable deduction.

Insurance - Consider a gift of an insurance policy that is no longer needed or will no longer benefit your survivors. You may also name NAMI Southern Arizona as a beneficiary on an insurance policy.

Land/Real Estate - A gift of real property (home, vacation property, vacant land, farmland/ranch or commercial property) can be valuable to NAMI Southern Arizona.

100% of all gifts and donations made to NAMI Southern Arizona *remain here in our community* to fund no-cost advocacy, education and support programs for individuals with mental illness and their loved ones.

How to Give

Beneficial Designation: Place a beneficial designation on any financial asset. You can obtain a form to designate NAMI Southern Arizona from your financial institution.

Bequest: Bequeath a specific asset, a dollar amount, a percentage of your estate or the remainder of your estate after all other gifts have been distributed. An advisor such as your attorney can help you include language in your will or trust specifying a gift to NAMI Southern Arizona as part of your estate plan.

Charitable Trusts: May provide a charitable tax deduction, reduction of income/estate tax, and income to the donor (or a beneficiary) over his/her lifetime. Consult your attorney and tax advisor to discuss a charitable trust.

Charitable Gift Annuities: Allows you to make a gift of cash or property to NAMI Southern Arizona, get immediate tax benefits and ensure that you or another beneficiary receives fixed quarterly or annual income payments for life. Charitable gift annuities can be structured through the Community Foundation of Southern Arizona.

Yes, I am pleased to accept membership in the **Legacy of Hope Society of NAMI Southern Arizona.**

I have included NAMI Southern Arizona or the Endowment Fund

- In my will or living trust
- As a beneficiary/partial beneficiary of a life insurance policy, retirement account or other financial asset
- Through an annuity, trust or other deferred gift
- I am interested in learning more, please call me at the number below

My name should appear in the Legacy of Hope Society records as follows: (Please print and include your spouse/partner if you wish):

Name (s) _____

Address _____

Phone _____

Email _____

Signature _____

Date _____

- You may list my name(s) in NAMI Southern Arizona’s publications, such as the Newsletter, website and on Donor Plaques.
- I prefer to remain anonymous.