

You'll feel better inside.

Visit [wellnesshouse.org](http://wellnesshouse.org) for more information or to register for one of our many programs

## One Ask + One Gift = A Year of Recognition

*Thank You to our Current Corporate Champions!*

Throughout the year, Wellness House offers numerous opportunities for corporations to support our efforts and receive recognition of their generosity to our community.

With the introduction of our **CORPORATE CHAMPION** program, our corporate supporters now have an opportunity to have year-long recognition through a variety of marketing vehicles, as well as significant visibility at our major fundraising special events. Additionally, there is room to customize the support according to the interests of the corporation.

As an example, for a one-time annual gift of \$25,000, the corporation will receive:

- \$10,000 - Gold Sponsorship of the Wellness House Ball (Fall)
- \$10,000 - Gold Sponsor of the Walk for Wellness House (Spring)
- \$5,000 - Customized underwriting plan for a particular program

In return, the Corporate Champion will receive all the benefits of a Gold Sponsor at the Wellness House Ball and Walk for Wellness in addition to:

- Special recognition in Wellness House Newsletters and Annual Report
- Recognition in Wellness House press releases, advertising, website, and social media
- Personalized in-service from Wellness House for their employees (topics such as stress reduction, healthy living, etc.)
- Opportunity for co-branded participant programs at Wellness House
- Feature on Wellness House Donor Wall

**Want to hear more?** Contact Kara Grell for more information at [kgrell@wellnesshouse.org](mailto:kgrell@wellnesshouse.org) or 630-654-5112.



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### FINANCIAL WELLNESS

David, I heard that I can save a lot of taxes by using a Charitable Trust. Can you please explain that?

A Charitable Remainder Trust (CRT) can save taxes while allowing a gift to a charity. Anyone who is subject to paying taxes on appreciated assets or who needs more income should look at a CRT. The benefits are:

- 1. Tax-Free Asset Change:** Appreciated assets may be sold tax free. Tax reduction is the main financial advantage of using a CRT.
- 2. Increased Cash Flow:** The appreciated asset may generate little or no income, but you are reluctant to sell due to the tax on the gain. The CRT allows the sell to take place tax free.
- 3. Current Income Tax Deduction:** A gift to a CRT can provide you with an annual income tax deduction to offset the income.
- 4. Retirement Planning and Asset Management:** The CRT can provide professional asset management.
- 5. Gift and Estate Tax Planning:** Amounts transferred to a CRT avoid gift and estate taxes.
- 6. Personal satisfaction:** In addition to tax benefits, you receive the satisfaction knowing you're helping the charity of your choice.

Securities and advisory services offered through NATIONAL PLANNING CORPORATION (NPC), Member FINRA/SIPC, a Registered Investment Adviser. RPI, Inc. and NPC are separate and unrelated companies.

### A WORD ABOUT DAVID...

David Blaydes, CFP, MS, volunteer for Wellness House, has been announced as a finalist out of several hundred nominees in the Invest in Others Leadership Volunteer of the Year award.

The Award recognizes David for his commitment to making a difference at the House. He was formally recognized at the sixth annual event in New York in September. As a finalist, \$5,000 was donated to Wellness House.



David, is a Certified Financial Planner, with a Masters in Financial Planning and 30 years' experience, has volunteered since 2002 helping those in the House with their financial planning.

He helps patients and families deal with such issues as being unable to work and losing income, accessing retirement plans without incurring penalties, obtaining disability benefits and estate planning.

For David, providing financial planning to people with cancer is a calling. "We help reduce the financial stress so they can focus on their health." His volunteer work provides a greater sense of purpose into his professional life. "In business, people are always looking for ways to make more money and get more clients," he said. "But it's not just about finding the means; it's about finding the meaning."

*Anyone with financial questions can email David.*

**Please consider becoming a member of the Haarlow Legacy Circle by including Wellness House in your estate plans.**

Founded in 2007, the Haarlow Legacy Circle recognizes the generosity, foresight, and thoughtfulness of individuals who are committed to the future of Wellness House by including Wellness House in their estate plans. For more information, please contact Kara Grell at 630-654-5112.