



— Jefferson's Ferry —

FOUNDATION

# Foundation

## focus

ANNUAL REPORT 2021



The Jefferson's Ferry community is moving back, safely, into full swing after a year of cautious reopening following COVID restrictions. While the past two years were difficult in many ways, I want to reflect on how navigating these challenging times brought our community closer together. We relied on each other for support, fellowship, and, most importantly, friendships. Our staff and residents

continued to work side by side to find new and innovative ways to bring everyone safely together, foster community, and grow in wellness. I am so proud of everyone who contributed their time and energy towards making our community a place they are proud to call home.

We are all extremely thankful for the efforts and support of so many over the last year, from our residents and staff to our generous donors; I cannot express my thanks enough. The kind efforts allowed us to continue to move our community towards the future with an optimistic outlook.

We are excited to continue on our Journey Toward Renewal, and we have begun to witness the impact of things changing around Jefferson's Ferry for the better. We have recently opened new independent living homes and dining facilities. This year, we broke ground on our Healthy Living Wing which will offer expansive spaces for health & wellness services, physician fitness and exercise programs, and state-of-the-art rehabilitation therapies.

As always, I thank you for your continued support. The impact of your generosity and belief in our mission and community will never go unnoticed.

**Robert E. Caulfield**

*President and Chief Executive Officer*



2021 – while it was undoubtedly better than 2020, we still found ourselves putting on our thinking caps to come up with creative ways to raise funds. The Foundation tried its first, and rather successful, virtual fundraiser – Paint Night. Who would have ever thought virtual events would be a

thing? We made the difficult decision to postpone our annual fundraiser, keeping the safety of our guests and residents at the forefront. Nevertheless, the Foundation persevered thanks to the continued support of our generous donors. With the best yet to come, we are looking forward to a prosperous 2022. Heartfelt thanks to each and every one of our donors who have continuously been our building blocks of success.

**Kaylin Peterson**

*Director of Philanthropy*

One Jefferson Ferry Drive  
South Setauket, NY 11720  
631.675.5507  
jeffersonsferry.org



## Third Time is a Charm

Although COVID brought our Annual Fundraiser to a halt again this past year, we are happy to say it was rescheduled for **Thursday, April 28, 2022** and was a great success!

It gives us great pleasure to announce that our 17th Annual Fundraiser, Making Memories, was the most successful fundraiser we have had in the past 17 years. Our net proceeds were off the charts, bringing in over six figures in funding for programs and services for the soon-to-be-built Memory Care Wing - \$102,797\* to be exact. The amount of support we had from the residents and vendors was just outstanding.

Thank you to everyone who donated, sold raffle tickets, bought them, gave up their wine, attended the event or supported us from afar. Your contributions are very much appreciated and will be put to good use in the very near future.



Please save the date of  
**THURSDAY, APRIL 27, 2023**  
for our or next  
Annual Fundraiser!

*\*Please note that financials reported from this event will be part of our 2022 Annual Report. Financials on pages 26 & 27 are a summary of funds raised in 2021.*





*"We make a living  
by what we get, but  
we make a life by  
what we give."*

*- Winston Churchill*

# MISSION

The Foundation shall work in partnership with Jefferson's Ferry Board of Directors and staff to promote and raise philanthropic funds to enhance services for our residents and staff, and to respond to the needs of our community. The Foundation will promote benevolence by enthusiastically engaging and enlightening the residents, families, staff, volunteer leaders, and other interested people and organizations to embrace the power and spirit of philanthropy.

# VISION

Our vision for the Foundation is to represent philanthropic excellence, in our quest to implement an ethical program—striving at all times to promote philanthropy in an impartial, unbiased, efficient way with a commitment to inclusiveness. Contagious generosity and the ensuing feelings of satisfaction will be our ultimate intent.





# Employee Education & Assistance

In March 2021, the Foundation increased the annual payout for textbook reimbursement from \$200 to \$500. We are very pleased to say that we raised over \$16,000 in 2021 alone to support our staff in their future educational endeavors.



## Aurora Consulting Sheds Light

Earlier in the year, we worked with a consulting firm, Aurora Consulting, to do a deep dive into the Foundation. Several residents and staff participated, and we received a lot of good feedback, much of which we took into consideration before the year ended. We expanded our list of funds to include Garden and Grounds, changed the name of the “General Fund” to Jefferson’s Ferry Fund and produced a comprehensive booklet about the Foundation. We also reconstructed our Donor Recognition Policy, the Donor Recognition Wall in the Community Center reflects the changes. We added a group called the “Heritage Society” which acknowledges donors who have notified us they have included Jefferson’s Ferry Foundation in their will or estate plans. There is now a key of symbols indicating special donor categories and a “Year in Review” panel to show the Foundation’s accomplishments for the year. If you haven’t already, be sure to stop by and check it out!



# Earth Day



To celebrate Earth Day, the Foundation handed out reusable tote bags. *They were a huge hit!* Each resident was encouraged to stop by the table in the Community Center to pick up their bag and some Earth Day themed puzzles. We handed out over 70 bags and the residents really enjoy using them.

# Paint Night Fundraiser



As we all know, these past few years has led us to try many things we wouldn't normally do. In an effort to keep the momentum going, we tried a virtual paint night fundraiser – and we're sure glad we did! We had 34 guests in virtual attendance. Residents, friends and family gathered to create a beautiful floral painting. It was wonderful to get everyone "together" for a fun night in. This event benefitted our Making Memories Fund and brought in over \$4,000.





# Alzheimer's Awareness Month



Last June, we promoted Alzheimer's and Brain Awareness month. Through the generosity of our residents and staff, we were able to raise a grand total of \$3,566 in just four weeks!

We split the proceeds, half went to the Long Island Alzheimer's Association and the other half went towards programs and services for residents of our new Memory Care facility. The Alzheimer's Association was very appreciative of our contribution, and we look forward to supporting them again this year.



## 50/50 Firecracker Raffle



The sparks were definitely flying off those ticket rolls as our volunteers sold tickets to our very first 50/50 raffle! Led by resident, Art Romita, over 2000 tickets were sold, raising a grand total of \$2,000! The Foundation was the recipient of \$1,000 which was designated to the Employee Education and Assistance Fund. The remaining balance was split among 3 lucky winners, two of whom ended up donating their winnings back to the Foundation.



## Coat Drive

Through our relationship with the Greater Patchogue Chamber of Commerce, we teamed up to collect coats for the Patchogue-Medford Youth Association. In just over a month, we had over 70 coats collected! Residents and staff combed their closets and before you knew it, our box was overflowing with warmth. Many people even donated brand new coats. It is nice to know that our efforts helped to keep someone warm during the cold months.



## Staff Holiday Party

Congratulations are in order to our residents for raising a record high total for our staff in 2021. Together, between residents and grateful family members, over \$220,000 was raised to be distributed to the staff as a holiday bonus. This is a very much anticipated time of year for our staff. Checks were distributed to 236 staff members with the average gift being \$891. For many, this check allows them to provide special gifts for their loved ones, pay off bills, and make necessary repairs or upgrades on their home.



oh what  
FUN





# MONTHLY DONATIONS

**Have a question or would like more information? Please contact our Director of Philanthropy, Kaylin Peterson at 631.675.5507**

**DID YOU KNOW YOU CAN MAKE A DONATION TO THE FOUNDATION ON A MONTHLY BASIS WITHOUT EVEN WRITING A CHECK?**

- 1** Choose which fund you would like to direct your donation: *Jefferson's Ferry Fund (General), Health and Wellness, Resident Assistance, Capital Improvements, Staff Education and Assistance, Garden and Grounds, Making Memories, or Strategic Innovation.*
- 2** Let us know how much and how often (minimum \$10/month) and we can charge it to your Jefferson's Ferry Account.
- 3** Receive a tax-deduction and thank you letter for your contribution at the end of the year.
- 4** Feel good about supporting your home and your fellow residents.

*Prefer to write a check? Please make check out to:  
Jefferson's Ferry Foundation*



# Cookies, Cocoa & Crafts

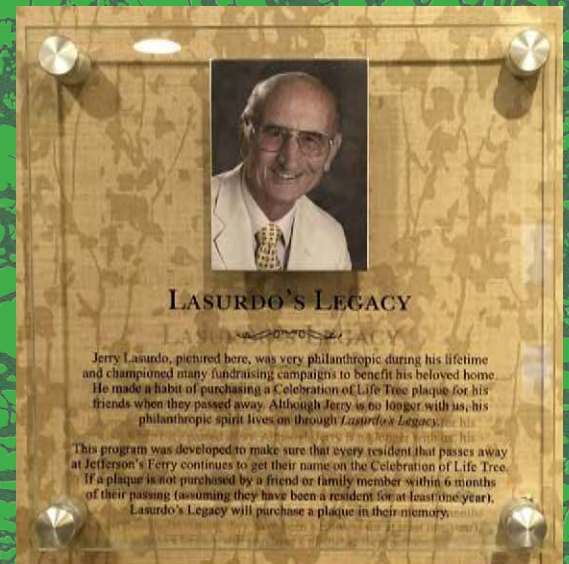


The holiday joy was definitely spreading at this event! In mid-December the Foundation hosted a holiday get together to help activate that holiday cheer. We had a total of 40 residents join in the fun. They were able to make crafts together, sip some warm cocoa, and engage in conversation. You can tell by the smiles on their faces that they had a great time. We look forward to making this an annual event.



## Lasurdo's Legacy

For the past 5 years, Lasurdo's Legacy has been providing a Celebration of Life Tree plaque for residents of the Vincent Bove Health Center who are no longer with us (if a family member does not purchase one within 6 months of their passing). The qualifications are simple: The awardee must have originally moved into Independent Living prior to moving to the Vincent Bove Health Center and be a resident of Jefferson's Ferry for at least one year. Mr. Lasurdo was a very big believer in Philanthropy, and made a habit of purchasing a Celebration of Life Tree plaque for his friends when they passed away. Although he is no longer with us, his philanthropic spirit lives on through his legacy.



# Happy Birthday To You!

Did you know the Foundation sends birthday cards to all residents of Jefferson's Ferry? Last year, we hand wrote over 300 cards and distributed to residents the week of their birthday. The residents really enjoy receiving them.

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## Nursing Scholarship Fund



Each year we offer a \$2,000 scholarship to high school students entering Suffolk Community College's Nursing Program. Through the Jefferson's Ferry Foundation's ***Staff Education and Assistance Fund***, one lucky High School senior will receive this wonderful opportunity. In 2021, we awarded \$2,000 to a local senior and she was thrilled! Certain criteria apply. If interested, please contact Human Resources at 631-675-5511.

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## AmazonSmile



### Do you shop on Amazon?

By going to **smile.amazon.com** instead of regular **amazon.com** (they're both exactly the same), you can donate to your favorite charity effortlessly! Amazon will donate a portion of your purchase to your designated charity. Simply click on the "supporting" icon beneath the Amazon search box and select your beneficiary. If you want to choose us (*we hope you will!*), the Foundation can be found under **Active Retirement Community Inc.** This is a very simple way to make a donation without costing you any more than your original purchase. In 2021, the Foundation earned \$75 through the AmazonSmile program.





# COMMEMORATE YOUR LOVED ONE

DID YOU KNOW YOU CAN MAKE A GIFT  
TO THE FOUNDATION IN HONOR OR IN  
MEMORY OF A LOVED ONE?

**Have a question or  
would like more  
information?**

**Please contact our  
Director of  
Philanthropy,  
Kaylin Peterson  
at 631.675.5507**

*Please mail your check to:*  
Jefferson's Ferry Foundation  
One Jefferson Ferry Drive  
South Setauket, NY 11720

**1**

Choose which fund you would like to direct your donation: *Jefferson's Ferry Fund (General), Health and Wellness, Resident Assistance, Capital Improvements, Staff Education and Assistance, Garden and Grounds, Making Memories, or Strategic Innovation.*

**2**

Let us know who you are commemorating or honoring and who we should notify of your kindness. Each donation comes with an acknowledgement card sent to the person of your choice. Be sure to provide the name, relationship and address of the person you wish to notify (*amount donated will not be disclosed*).

**3**

Receive a tax-deduction and thank you letter for your contribution.

**4**

Feel good about supporting your home and your loved one at the same time.

*Please make check payable to: Jefferson's Ferry Foundation*





# ENTRANCE FEE REFUND GIFT

**DID YOU KNOW THAT YOU CAN LEAVE A  
PORTION OF YOUR REFUNDABLE ENTRANCE  
FEE TO JEFFERSON'S FERRY EFFORTLESSLY?**

## **EXAMPLE:**

Maria really wanted to give a large gift to Jefferson's Ferry for all the wonderful years she lived here, but, her current finances wouldn't allow for it. Maria had a Refundable Entrance Fee of \$327,000 going to her estate upon her passing. She decided to designate 10% of her refund to Jefferson's Ferry. Maria was able to give Jefferson's Ferry a gift of \$32,700 and felt good about leaving a lasting impact on her home.

## **HOW DOES THIS BENEFIT ME?**

By donating a portion of your entrance fee, you can leave your mark on Jefferson's Ferry, feel good about making a contribution, and get your name on our donor wall in the Community Center. Also, your estate may be able to claim a tax deduction.

**Have you already designated a portion of your refund to us?  
Let us know so we can include your name on our donor wall!**

**Have a question or  
would like more  
information?**

**Please contact our  
Director of  
Philanthropy,  
Kaylin Peterson  
at 631.675.5507**



**Jefferson's Ferry**  
FOUNDATION



A decorative header featuring a teal background with colorful streamers and confetti in shades of pink, blue, yellow, and purple.

# Wahoo!

Did you know that in 2021, through employee payroll deduction donations, we raised

\$4,163.96!?

This funding was put towards: Employee Education & Assistance, Jefferson's Ferry Fund (General), Health and Wellness, and Resident Assistance.

*The Jefferson's Ferry Foundation was established in 2006 by visionary residents whose desire to strengthen and support the Community was honed through a lifetime of generous giving to important community priorities. The Foundation focuses on support for program enhancements, amenities, buildings and grounds improvements, financial assistance for qualified residents with unexpected needs, innovation and technology, as well as other priorities as they arise.*

## THE FUNDS

*Your gifts should support your passion! We offer these options for discerning donors. We also welcome an opportunity to discuss your personal priorities, should they not be included in these selections.*



### JEFFERSON'S FERRY FUND (GENERAL FUND)

The Jefferson's Ferry Fund is an unrestricted fund. It provides support to the Jefferson's Ferry Community with maximum flexibility. It provides financial resources directly where they are most needed, when they are most needed.



### RESIDENT ASSISTANCE FUND

When residents move to Jefferson's Ferry they have carefully planned for their future, setting aside the financial resources to sustain them through their lifetimes. Occasionally unexpected things happen. Even the best planning isn't always a guarantee. Generous donors to the Resident Assistance Fund give support – and peace of mind – to qualified residents who, through no fault of their own, can no longer afford the full cost of needed care and services.



### GARDENS AND GROUNDS FUND

Outdoor spaces are therapeutic. Being outdoors in nature reduces stress levels and makes us feel more relaxed. Time spent outside contributes to reducing depression and anxiety, improves the immune system, and can be a haven of tranquility. Generous donors to the Gardens and Grounds Fund will create the future of the Jefferson's Ferry landscape while having a lasting impact on the environment, unique ecosystems and quality of life at Jefferson's Ferry.



### MAKING MEMORIES FUND

Alzheimer's disease and related dementia diagnoses are stressful and can be overwhelming for patients and families alike. The Jefferson's Ferry Memory Care Wing will offer programs focusing on capabilities and interests – not limitations and concerns. With our focus on the whole person, each unique individual has the opportunity to enjoy life as fully as possible. The Making Memories Fund will directly support life-enhancing programs, services, and activities such as exercise, massage therapy, intergenerational activities, day trips as well as staff education and related resident services.





## HEALTH AND WELLNESS FUND

Wellness is a holistic and active pursuit combining many aspects that strengthen and enhance the mind, body and spirit. Generous donors to the Health and Wellness Fund help support programs which enrich the entire human experience. These programs encompass the primary elements of a healthy lifestyle: emotional, intellectual, physical, social, spiritual, occupational and environmental well-being.



## CAPITAL IMPROVEMENTS FUND

Ongoing improvements to the buildings and grounds of the Jefferson's Ferry campus enhance the lives of our residents. While the majority of these improvements are implemented through the Jefferson's Ferry budget, gifts to the Capital Improvements Fund support additional possibilities. Gifts help ensure that our distinctive campus retains or exceeds standards for state-of-the-art safety, security, and enjoyment of our residents today and tomorrow.

Occasionally, we will identify special projects or priorities that offer unique opportunities for generous donors. Naming opportunities may accompany these projects. We are glad to review and discuss them with interested donors.



## EMPLOYEE EDUCATION AND ASSISTANCE FUND

Education is a lifelong pursuit. Staff members who provide excellent care to residents are continually working to learn more, expand their understanding and grow as individuals and professionals. The Employee Education and Assistance Fund provides tuition reimbursement and textbooks to qualified staff members. The fund also provides financial hardship loans to staff in times of dire need.



## STRATEGIC INNOVATION FUND

The Strategic Innovation Fund has the power to improve the present and shape the future. The fund provides financial flexibility and valuable resources. It encourages the Jefferson's Ferry Community to take advantage of unexpected opportunities, explore options for new services or amenities, and pilot new programs.



# DEDICATE YOUR GIFT

## HONOR AND MEMORIAL TRIBUTES

Residents are the heart of our community. Honor the life or memory of a loved one and support the work of the Jefferson's Ferry Foundation with a loving tribute gift. The resident honored or the family member of a resident memorialized will be informed of your generosity, with no mention of the amount of your gift. Family members and friends may honor or remember individuals, couples or family groups through these options:



### COMMEMORATIVE GIFTS

Gifts of any size may be made at any time. They may be especially meaningful to celebrate a birthday, anniversary, family milestone or holiday. If you wish, you may direct your gift to one of our funds. Undesignated gifts will be added to the Jefferson's Ferry Fund.



### IN LIEU OF FLOWERS

Requesting charitable donations in lieu of flowers is very common. You can choose to have your loved ones make donations to the Jefferson's Ferry Foundation on your behalf. You can even choose the fund you would like the donations to be directed to.



### COMMEMORATIVE TREE

When you honor or remember a loved one with a gift of \$2,500, you may choose a tree which has been incorporated into our master landscape plan. Each tree will thrive in our climate and includes a brass plaque. We will work with you to customize the text for the plaque. Commemorative Tree gifts support the Jefferson's Ferry Fund.

*NOTE: As Jefferson's Ferry implements the Campus Master Plan, the number of trees may be limited.*



### COMMEMORATIVE BENCH

When you honor or remember a loved one with a gift of \$1,000, you can leave your mark on Jefferson's Ferry. Each Commemorative Bench carries your personal message of up to 35 characters and beautifies our community for years to come. Commemorative Bench gifts support the Jefferson's Ferry Fund.

*NOTE: As Jefferson's Ferry implements the Campus Master Plan, this program will be suspended.*



### CELEBRATION OF LIFE TREE

Our Celebration of Life Tree is an installation consisting of memorial and celebratory engraved plaques. When you honor or remember a loved one with a gift of \$350, you may select among available plaques which can be engraved with two lines of text, up to thirty (30) characters per line (*includes spaces*). Celebration of Life Tree gifts support the Jefferson's Ferry Fund.



# RECOGNITION FOR GENEROUS DONORS

Donors whose gifts support the work and mission of Jefferson's Ferry through the Jefferson's Ferry Foundation shall be honored and recognized. Recognition shall honor total giving, sequential giving and continuous giving. Contributions to the Staff Holiday Fund are not included in giving totals.

In advance of being added to our Donor Recognition Wall, qualified donors shall receive and must return a permission form stating how they would like their name displayed or if they prefer to remain anonymous. The following are different categories you may enter, based on your annual giving.

## LEADERSHIP ANNUAL GIVING SOCIETY

The Leadership Annual Giving Society honors total giving in one calendar year. Donors at the following levels shall have their names included on our Donor Recognition Wall and receive an invitation to the Jefferson Ferry Foundation's Donor Recognition Dinner Reception. Recognition levels are for total gifts received in one calendar year and are renewable annually:

Associate: \$500 – \$999 | Pioneer: \$1,000 – \$2,499 | Supporter: \$2,500 – \$4,999

## FRIENDS OF JEFFERSON'S FERRY FOUNDATION

Donors whose cumulative lifetime giving to Jefferson's Ferry Foundation totals one of the categories below shall become members of the Friends of Jefferson's Ferry Foundation. Members shall have their names included on our Donor Recognition Wall and receive an invitation to the Friends of Jefferson's Ferry Foundation VIP Breakfast and Donor Recognition Dinner Reception. New members shall be inducted into the Friends of Jefferson's Ferry Foundation at the VIP Breakfast and receive a certificate of membership.

## PRESIDENT'S SOCIETY

Patron, Partner, and Benefactor membership in the President's Society is renewable on a triennial basis.

Patron: \$5,000 – \$9,999 | Partner: \$10,000 – \$14,999 | Benefactor: \$15,000 – \$24,999

## CHAIR'S SOCIETY

Sterling, Emerald, Diamond, Visionary and Legacy membership in the Chair's Society is awarded on a permanent basis.

Sterling: \$25,000 – \$49,999 | Emerald: \$50,000 – \$99,999 | Diamond: \$100,000 – \$249,999  
Visionary: \$250,000 – \$499,999 | Legacy: \$500,000 or more

## SUSTAINING FRIENDS OF JEFFERSON'S FERRY FOUNDATION

Members of the Friends of Jefferson's Ferry Foundation, who continue to give \$500 or more annually, shall be Sustaining Friends of Jefferson's Ferry Foundation. Their continuing participation shall be indicated by a star symbol next to their name on the Donor Recognition Wall.

## JEFFERSON'S FERRY FOUNDATION HERITAGE SOCIETY

Donors who notify us that they have included Jefferson's Ferry Foundation in their estate plans become members of the Jefferson's Ferry Foundation Heritage Society. Estate gifts include, but are not limited to: bequests, remainder trusts, entrance fee refunds, charitable gift annuities, and paid-up life insurance policies. Members shall have their names included on our Donor Recognition Wall and receive an invitation to the Donor Recognition Dinner Reception and the VIP Breakfast. Donors shall be inducted into the Society at the VIP Breakfast immediately following their qualification as members. Inductees shall receive a certificate of membership. Membership is permanent in accordance with the Foundation's Donor Recognition Policy unless the member asks to be removed. Participation may be anonymous.

## WAYS TO GIVE

There are many ways to make a gift to the Jefferson's Ferry Foundation. Thoughtful donors may choose one or more options which best meet their needs and goals. Always consult with your legal and financial advisors to be sure the gifts you make are in your best interests and help meet the mission and goals of the programs supported by the Jefferson's Ferry Foundation.

### ONLINE WITH A CREDIT CARD

Giving is as simple as clicking and entering your payment information!

Please visit our website [www.jeffersonsferry.org](http://www.jeffersonsferry.org) and click the "Foundation" tab at the top.

### CHECK

If you prefer the convenience of writing a check, please make it payable to **Jefferson's Ferry Foundation**.

#### MAIL TO:

*ATTN: Director of Philanthropy  
Jefferson's Ferry Foundation  
One Jefferson Ferry Drive  
South Setauket, NY 11720*

### QUALIFIED RETIREMENT PLAN DISTRIBUTION

Contribute directly from your qualified retirement plan with a transfer from your IRA. Contributions count toward your required minimum distribution (RMD). These contributions are made with money on which you never paid tax, so you receive no tax deduction, but they count toward your RMD and the total isn't included in your adjusted gross income. You must follow the IRS's rules for these gifts which may also be referred to as qualified charitable distributions (QCDs) or charitable IRA rollovers.

### DONOR-ADVISED FUND

If you have a donor-advised fund to help you manage charitable giving, you can support the Jefferson's Ferry Foundation by recommending a grant from your donor-advised fund.

### APPRECIATED SECURITIES

Contributions of long-term appreciated securities give you a two-fold income tax benefit: a charitable deduction for the full present fair market value and no tax on the appreciation. Should the securities have a loss, consider selling them first and then donating the proceeds, which allows you to recognize the loss as a deduction.

### ENTRANCE FEE REFUND

Contributing your entrance fee refund directly to the Jefferson's Ferry Foundation is a simple way to benefit the community you call home. For individuals making an entrance fee refund contribution, there may be significant tax planning advantages. There are no out-of-pocket expenses to create the gift.



## BEQUEST IN YOUR WILL

Simply put, a bequest is a gift made through your will. You may include a bequest when you have a new will prepared or add a codicil to your existing will. Either way, it is a simple method for including Jefferson's Ferry Foundation in your estate plans.

## CHARITABLE GIFT ANNUITY (*CURRENT OR DEFERRED*)

Charitable gift annuities (CGAs) combine an estate gift to Jefferson's Ferry and an annuity. Charitable gift annuities may benefit one or two annuitants. Typically, they are spouses or siblings, but may include friends, parents and children or other age-qualified persons. Most CGA donors select immediate income distribution plans. If you prefer, you may defer the income payments for a year or more to better fit your personal income requirements. Part of each CGA payment is a tax-free return of principal, so annuitants receive income which is a combination of taxable and tax-free income, as well as an initial charitable deduction.

## CHARITABLE LEAD TRUST

A charitable lead trust is an irrevocable trust designed to provide charitable financial support for a fixed time period. At the end of the designated time, the remaining assets are passed to family members or other beneficiaries. A charitable lead trust is often considered to be the inverse of a charitable remainder trust. A charitable lead trust may reduce gift and estate taxes and control the timing of passing assets to your children, grandchildren, and great-grandchildren, or other heirs.

## CHARITABLE REMAINDER TRUSTS

A charitable remainder trust is a planned giving vehicle that allows a donor to place an irrevocable major gift of cash or property into a trust. The trust then pays a fixed amount of income each year for a specified period of time to the donor or the donor's specified beneficiary after which the remainder of the trust passes to the designated charity.

## LIFE INSURANCE

Create a new life insurance policy or donate a paid-up policy you no longer need. A gift of a life insurance policy does not reduce your income, and you may receive significant income tax reductions. There are several options for making such a gift that may increase your ability to make a significant gift to Jefferson's Ferry.

## REAL ESTATE GIFT

Make a gift of real estate to the Jefferson's Ferry Foundation and enjoy the option of a gift that doesn't affect your lifestyle. When you contribute appreciated property that you have held longer than one year, you may qualify for a federal income tax charitable deduction and avoid paying capital gains tax.

# CHAIR'S SOCIETY

## HERITAGE SOCIETY

Anonymous (1)  
Carol Ann Baocock  
Charlotte M. Chieffo  
Charles and Mary Chubb  
Dorothy Doscher  
Carol A. Fenter  
Laura Jean Glover  
Edgar Kann - In Memory of Rita Kann  
Arlene Kaufman  
Helen and Jerry Lasurdo  
Joseph w. Sauls  
Jan Parker

## LEGACY

Carol A. Fenter <sup>^\*</sup>  
Helen and Jerry Lasurdo <sup>^+</sup>

## DIAMOND

Dr. Paul and Claire Baer <sup>\*</sup>  
Dorothy Doscher <sup>^+</sup>  
Charles and Mary Chubb <sup>^+\*</sup>  
Irma and Charles Rosenfeld <sup>+</sup>  
Shirley J. Skeldon <sup>+</sup>  
New Life Management & Development, Inc.

## EMERALD

Beverly Birns & Harold Atkins <sup>+</sup>  
Florence Bolatin <sup>+</sup>  
The Buettner Family <sup>\*</sup>  
Eastern Portable X-Ray Corp.  
In Memory of Arthur W. Hunstein <sup>+</sup>  
Edgar Kann - In Loving Memory of Rita Kann <sup>^</sup>

Marjorie and Stephen Levy  
Morrison Senior Dining Corporation  
Nancy Orth - Beloved Mother and  
Passionate Gardener  
R. W. Rogé and Company, Inc.  
Joseph W. Sauls <sup>^</sup>  
Claire Selden Smith  
Betty and Mitchell Steinberg

## STERLING

In Loving Memory of Harry V. Bender with Love Dr. &  
Mrs. Vincent P. Basilice  
Loretta and Vincent Bove <sup>+</sup>  
Karen Brannen  
Fred Bryant and Family -  
Bryant Funeral Home, Inc.  
Clarence Corneliusen <sup>+</sup>  
Dr. Richard F. and Elizabeth M. Dietz <sup>+</sup>  
Mary R. Fredel  
Garfunkel Wild, P.C. <sup>\*</sup>  
Laura Jean Glover <sup>^+</sup>  
Dr. Ron Vitori & Family - GreenPeak C4  
Herbert J. Sims & Co. Inc <sup>\*</sup>  
John T. Mather Memorial Hospital <sup>\*</sup>  
Caroline Gassner Levine  
Deanna and Harry Levinsky  
Mary McGrann <sup>\*</sup>  
Isabel and Americo Melo <sup>+</sup>  
Joseph Mitola <sup>\*</sup>  
Mimi and Herbert Perr  
Procure LTC Pharmacy  
Linda Fredel Sharpley  
David Sipperly and Marilyn Berg <sup>\*</sup>  
Pauline and David Sterling <sup>+</sup>  
Barbara Stubenrauch <sup>\*</sup>  
TRITEC Building Co, Inc.  
Mary and Edward Ufier <sup>+</sup>



# PRESIDENT'S SOCIETY

## BENEFACTOR

A1 Roofing \*  
495 Express Foods, Inc.  
Martin and Sheila Blume  
Douglas Brush  
Bob and Kelly Caulfield \*  
Central Outdoor Services, Inc.

Home Instead Senior Care \*  
Ruth Jahier  
Jet Sanitation Services Corp.  
Ingeburg Luttmann  
Doris and Tom McGrath  
Michael Nastro/Fairview Pharmacy

Christina L. Procopio and  
Domenico S. Procopio +  
Bonita and Norman Sutin  
York Scaffold Equipment Corp.  
Ira and Barbara Zarett \*

## PARTNER

Chris and Silke Adamo  
Anonymous (1)  
Gary and Pauline Bencivenga \*  
Bergers Wholesale Meats \*  
Best Cut Carpet \*  
Patricia Boone \*

Carlucci & Son General Contracting \*  
Joyce Edward \*  
Durant and Dolores Eklund +  
Ann Gramstorff \*  
HealthPRO Heritage  
Frane and Larry Helner \*  
Kingston's Fish Market, Inc.

Katherine L. Klaum \*  
NY Cancer & Blood Specialists \*  
Jo and Carl Pheffer \*  
Helen Seeburger \*  
Emma Tufano \*  
Margaret M. Wisniewski \*

## PATRON

Dr. Denise Abselet \*  
Joan Bayer  
Barbara Sue Bellin \*  
Certilman Balin Adler & Hyman, LLP \*  
Charlotte M. Chieffo ^\*  
Cullen & Danowski, LLP  
Chuck and Nancy Darling \*  
Cathy DeAngelo  
Victor P. Dezelic, Corporate Synergies \*  
Pat Galaskas \*

Dorothy Gilbert \*  
Phyllis J. Grebe  
Greystone \*  
Bob Heins \*  
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KDA Architects \*  
Linda and Paul Kolakowski  
William Lockwood \*  
Vito Manzella and Janet Hovnanian  
In Memory of Anne Moran

Nelson & Pope Engineers & Surveyors \*  
Paramount Pest Elimination Inc. -  
In Memory of Dr. Joseph D'Agrosa  
and Dr. Milton Tuerk \*  
Mary Grimes Pilosi  
Krista and Wayne Shattes  
Jean Shea \*  
Melvin and Giulia Simpson  
Myrtle Spann  
Ziegler

# LEADERSHIP ANNUAL GIVING SOCIETY

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Francis Duffy  
Epoch 5 Public Relations  
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Siri Bergheim  
Rowena Book  
Carmela Burgazzoli  
Joel Catania  
Pat Chicko  
Rose Coffey  
Claire Donohue  
Barbara Doxey  
Thomas Durando, Jr.

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Suzan and Fred Goldhaber  
Barbara Herrmann  
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Joseph and Michele Mainvielle  
Ilio and Rose Manzoni  
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Donald and Priscilla Schwabe  
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Stephen Semder  
Senior Service Assistants, LLC  
Philip B. Simoni

Spectragraphic, Inc.  
H. Mae & Gene Sprouse  
StatimRx  
Barbara Strongin and  
Gerhart Friedlander  
Rosemarie Thompson  
Carol B. Trabulsi  
Vivian and Stuart Fisher  
Ruth & Hal Weinreb  
David Wooster

## ASSOCIATE

Anonymous (1)  
The Cotins Family

David Barry Associates, LLC  
Anna Kerekes

Theo Pavlidis  
Lee Simmons





**ARE YOU PAYING INCOME TAX ON REQUIRED DISTRIBUTIONS FROM YOUR IRA?**

**WHAT'S YOUR NEXT MOVE?**

## **HOW TO DONATE TO A CHARITY FROM YOUR IRA**

**Did you know?**  
The Jefferson's Ferry Foundation is a 501 (c)(3) organization.

**Do you have an IRA [Individual Retirement Account]?**

If you do, chances are you know annual withdrawals are required once you turn age 72. But, did you know if you donate your withdrawal directly to a qualifying charity you can avoid paying tax on the distribution completely?

**Well, how do I know who is a qualifying charity?**

Good question! A qualifying charity must be deemed a 501(c)(3) by the IRS, making it exempt from federal taxation. As a reference, the Jefferson's Ferry Foundation is considered a qualifying charity and is a 501(c)(3) organization.

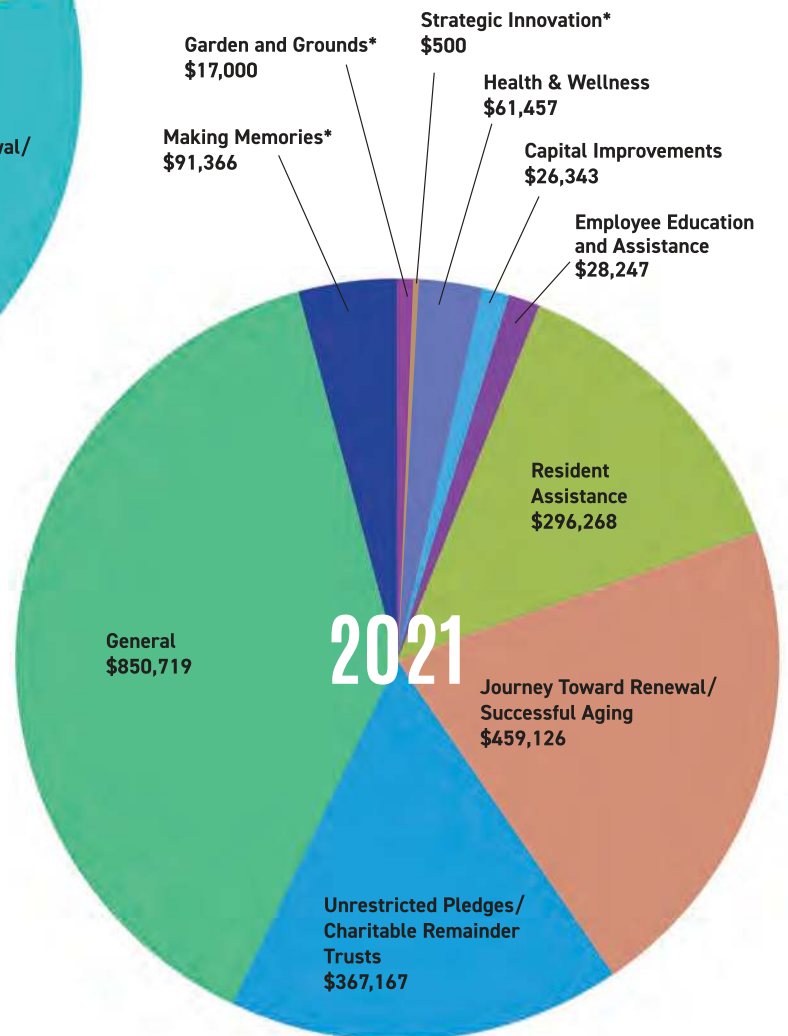
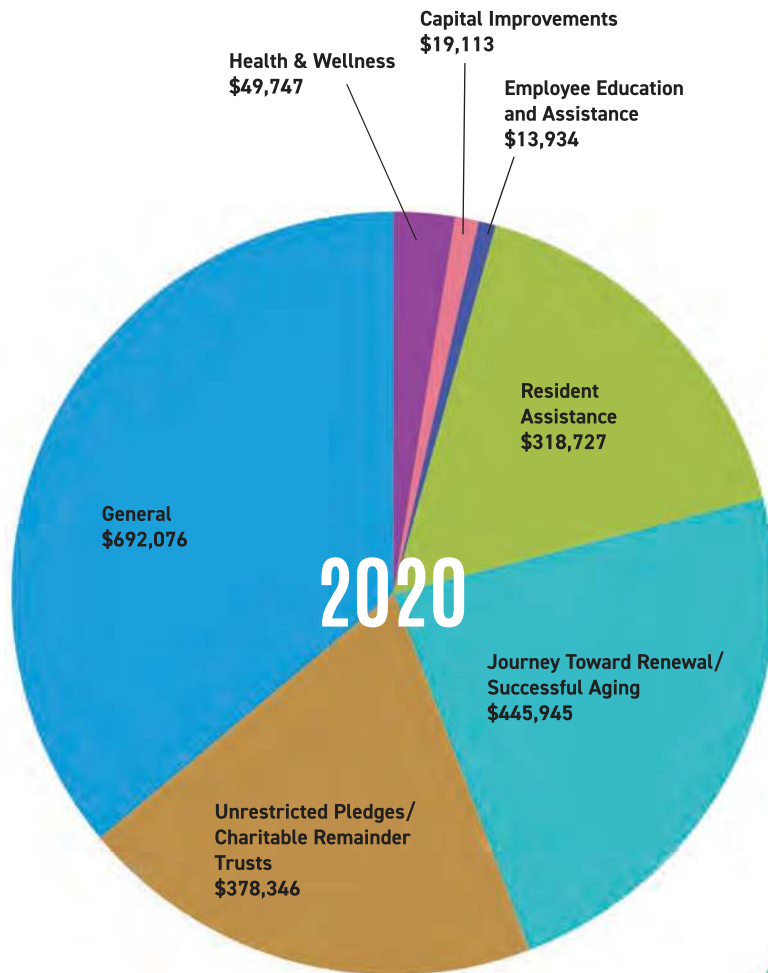
IRA owners can transfer up to \$100,000 each year to a charity of their choice – you can also choose to donate to multiple charities in the same year, all tax free! The higher your tax bracket, the bigger the benefit.

If you choose to donate from your IRA, funds must be transferred *straight from your IRA to the charity*. If you remove the funds yourself and then donate them to the charity, you will not avoid paying taxes on the funds removed.

**Does this sound like something you might be interested in?** If so, be sure to contact your financial advisor or call Kaylin Peterson at 631-675-5507 for more information.

# FOUNDATION FUND BALANCES

(DECEMBER 31, 2021)



**TOTAL NET ASSETS AS  
OF DECEMBER 31, 2021  
\$2,194,937**

*\*This fund was created in 2021.*

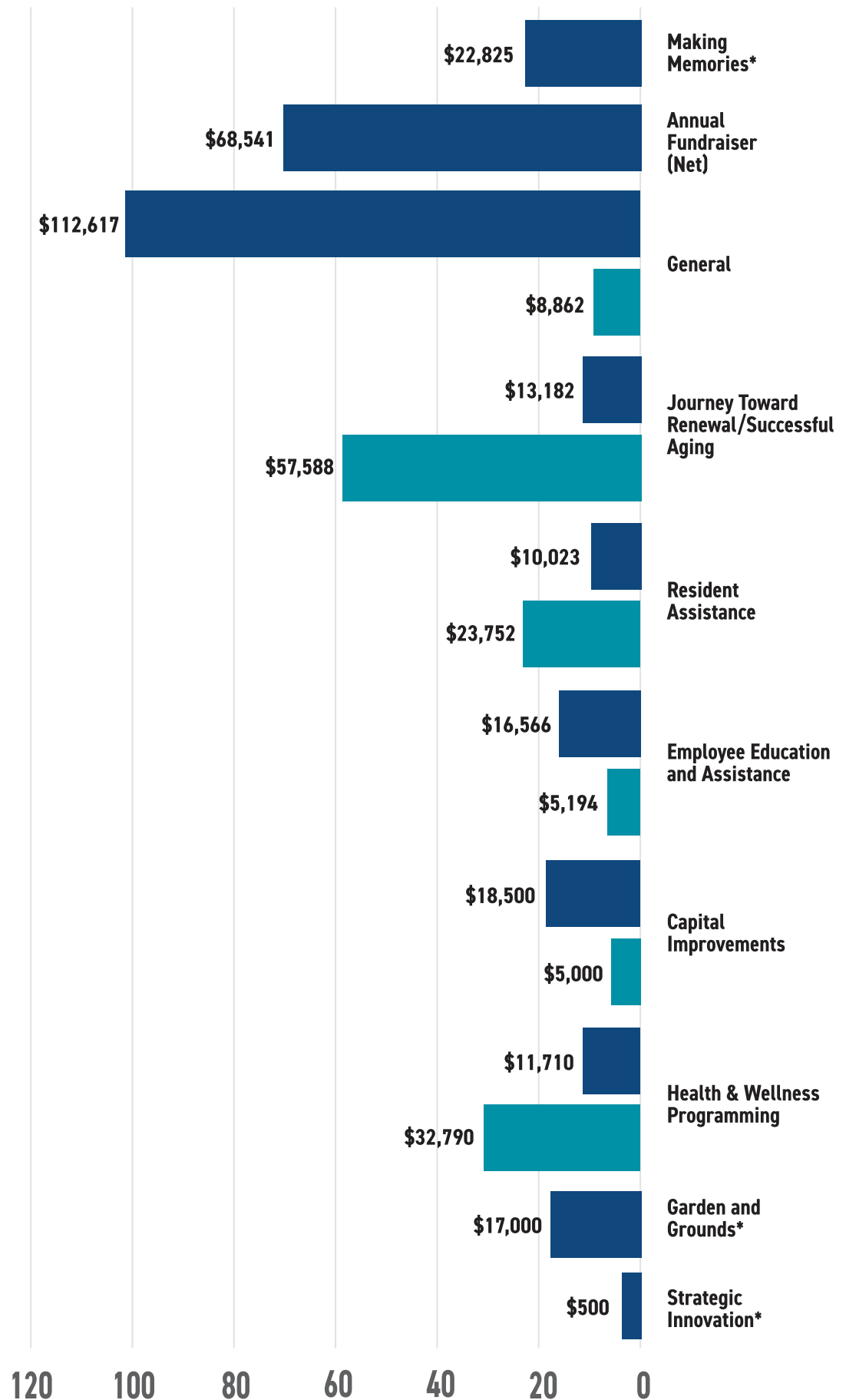


# 2021 CONTRIBUTIONS RECEIVED

(DECEMBER 31, 2021)

2020

2021



TOTAL CONTRIBUTIONS  
RECEIVED IN 2021

**\$174,218**

\*This fund was created in 2021.

# Sharing is Caring

While we may not be having Employee Auctions, there are several local organizations that would love to have your stuff! Please see below for a list of organizations you can donate to.

## Organizations That Pick-Up FURNITURE DONATIONS:

- Open Door Exchange - (631) 751-0176  
email: [opendoorexchangeli@gmail.com](mailto:opendoorexchangeli@gmail.com)
- Hope House Ministries - (631) 509-1101
- St. Vincent De Paul - (631) 858-0380
- Big Brothers Big Sisters - (631) 234-0000
- Vietnam Veterans of America - (631) 582-0242
- Habitat for Humanity of Suffolk Restore - (631) 521-7789
- Angela's House - (631) 905-7117  
email: [freepickup@angelashouse.org](mailto:freepickup@angelashouse.org)

## TO DONATE SMALL ITEMS

*(these places do not do pick-ups, you have to drop the items off):*

- Island Thrift - (631) 736-3979  
1770 Middle Country Road  
Centereach, NY 11720
- Mather Hospital Thrift Shop - (631) 473-1320  
75 N Country Road  
Port Jefferson, NY 11777

