



Jefferson's Ferry

FOUNDATION

# Foundation

focus

ANNUAL REPORT 2020



The mood at Jefferson's Ferry is one of gratitude and relief as we begin to cautiously reopen and get back into the swing of community life. You will see in the following pages that the Jefferson's Ferry community did not allow COVID restrictions to get them down. It was quite the opposite, with our residents brainstorming a seemingly endless supply of ideas that keep everyone engaged, involved and

contributing their time and funds to bolster spirits, help those in need and be productive.

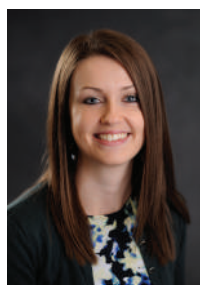
We are all extremely thankful for the efforts and support of so many over the last year, from our residents and their families to our staff and our generous donors. This united effort enabled us to deal with the present and look to the future with hopeful expectancy.

Included in that future is the Journey Toward Renewal, which has engaged us all with the anticipation of positive change, including new dining options to explore, new friends to meet, expanded health and wellness amenities and programs.

Spring is right around the corner. This season of renewal has much to offer, and you can be sure that the entire Jefferson's Ferry community will heartily embrace it.

Thank you as always for your continued support. The impact of your generosity and belief in our mission cannot be understated.

**Robert E. Caulfield**  
President and Chief Executive Officer



As we all know, 2020 was anything but "normal". Our everyday lives were dramatically changed. Events, vacations and social interaction were put on hold. Despite all these changes, one thing that remained constant was people's willingness to give. The entire community stepped up and wanted to

know how they could help. They rallied to raise funds to buy staff meals and offset costs of the unexpected PPE, disinfectants, COVID-19 tests, and food prep containers – all on their own. It was truly humbling to see the community come together when we couldn't have been further apart. All things considered, the Foundation had a great year and we are looking ahead to a prosperous 2021. With the Journey Toward Renewal in full motion, we should have a lot of exciting things to look forward to. Thank you to each and every donor who has contributed to the Foundation's fundraising efforts, we couldn't be where we are today without you.

**Kaylin Peterson**  
Director of Philanthropy

*"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.



## A Penny for your Thoughts



Did you know February 12th is Abraham Lincoln's birthday? In celebration, residents got together to collect pennies (and other coins) to benefit the Resident Assistance Fund. Led by Art Romita, the residents collected over 100,000 pennies plus an anonymous donation of \$1,000, resulting in a total donation of \$2,004.93! These funds benefited the Foundation's **Resident Assistance Fund**, which provides financial assistance to residents of Jefferson's Ferry who may have run out of money through no fault of their own.

## Stuff that Bus!

For two weeks in March, we collected food to benefit Island Harvest Food Bank. As you can see, we had quite a variety from the hands of many generous residents and staff. We packed up our Jefferson's Ferry bus, and off we went. We were greeted with an enormous box on a pallet and our guys began to unload our collection into the box. Next thing we knew, they were coming out with a forklift to pick it all up! The end result was a total of 527 pounds of food, can you believe it?



## There's No Such Thing as Free Lunch – or is There?

As we all know, the first quarter of 2020 was a rough one, but that didn't stop people from wanting to give. Marge Pols rallied residents together to raise funds to purchase a meal for the staff during the pandemic. One meal per person was the goal, but she did so well that each staff member received TWO vouchers for a free meal in the café. In total, **\$3,875** was raised and any excess was put towards the Employee Education and Assistance Fund. This was very much appreciated by the staff at a time when they needed it most.

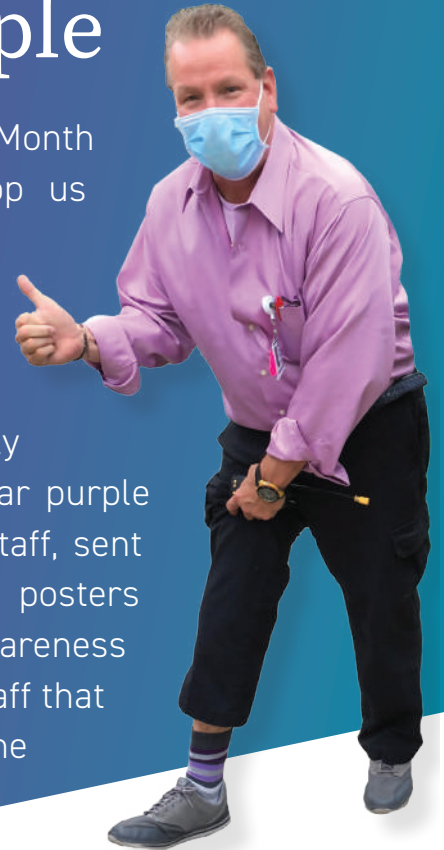


# Paint Jefferson's Ferry Purple



June was Alzheimer's Awareness Month and COVID-19 wasn't going to stop us from raising funds to support this worthy cause that affects so many seniors. Like many other organizations, we got creative and found ways to fundraise while socially

distancing. We encouraged everyone to wear purple on designated days, offered "Wear Jeans on Friday" to the staff, sent out flyers around Jefferson's Ferry asking for support, put posters on the property reminding everyone June is Alzheimer's Awareness Month and put purple flowers on the doors of residents and staff that contributed. Overall, we raised a total of \$4,247, landing us in the top three teams on Long Island! Way to go!



## National Senior Day



Did you know National Senior Citizens Day is August 21? To celebrate our seniors, as a surprise, the Foundation set up a pop-up cookie giveaway! Residents were excited to get their free giant chocolate chip cookie upon exiting the café. Kaylin Peterson, Director of Philanthropy, even went around in the Community Center handing them out to unsuspecting residents. Who doesn't like free cookies?





# 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**



# No Fundraiser? The Show Must Go On...



Many of you know 2020 was supposed to be an exciting year for the Foundation's Annual Fundraiser – our first time using an outside venue. However, like many exciting plans, this one got cancelled too; but nevertheless, the need for funds continues! In place of our physical fundraiser, we made a campaign for support through the mail. We purchased a mailing list, mailed to residents, and previous donors. We even figured out a way to still have our raffle baskets! The end result was amazing – over 120 donors and 1,582 raffle tickets later we raised more than \$58,000 for our Journey Toward Renewal's Memory Care Building between the two.





## Masks for Sale

The year 2020 no doubt has led many non-profits to get creative in raising money. Why not sell our own masks? I mean we have to wear one anyway, right? The Foundation designed its very own signature Jefferson's Ferry mask and sold them as a way to raise money for Health and Wellness Programming. We ordered a total of 250 and sold 198 of them in no time, raising almost \$2,000! That being said, we still have 52 left for the taking if you need a fresh one. Masks are sold at one for \$12 or 2 for \$20. They're proudly made in the USA, come individually wrapped and are very comfortable. If you are interested, please contact Kaylin Peterson at 631-675-5507 to order yours.

## COVID-19 Relief Fund

When COVID hit, the residents immediately wanted to do something to help. Jefferson's Ferry was incurring all kinds of new costs between PPE, cleaning supplies, meal packaging, overtime and signage. At the suggestion of a resident, we created a **COVID-19 Relief Fund** to help offset some of our additional costs, and the responses were very humbling. A total of \$29,675 was raised from 43 generous donors.







# MONTHLY DONATIONS

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

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

**1**

**Choose which fund you would like to direct your donation: *General, Health and Wellness, Resident Assistance, Capital Improvements, Staff Education and Assistance or Journey Toward Renewal.***

**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***



## Gobble-dy Good Raffle

Shout out to "Farmer Art" for "hunting" down three scratch-off ticket turkeys! Through the generosity of several residents, Art



raised enough money to purchase \$300 in scratch-off tickets. Crafty Pat

Boone then put her creative juices to work and made (3) beautiful cardboard turkeys on which to display the tickets. Tickets were available for purchase by staff and residents. Over 1,168 tickets were sold, raising \$2,360 towards Health and Wellness Programming! Congratulations to the three winners (two residents and one staff member)!

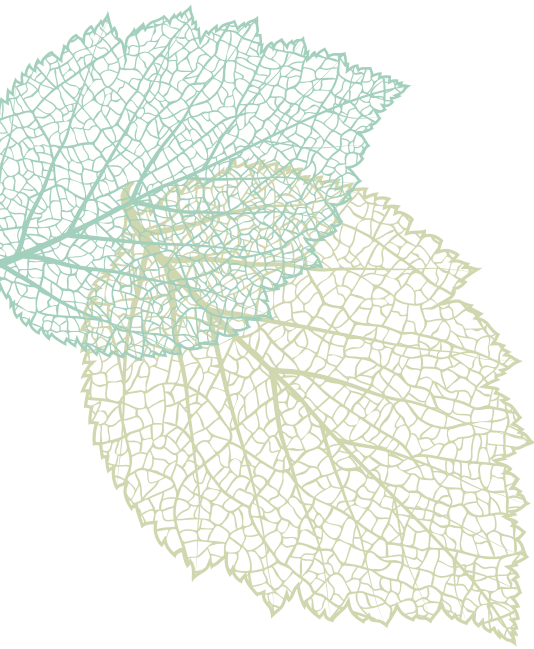


## It's Official – We Broke Ground!

The Jefferson's Ferry Foundation has been raising funds for the expansion project for many years, and the time has finally come to put the shovels in the ground. We will be contributing over \$435,000 this year to the Journey Toward Renewal expansion, previously known as the "Successful Aging Project". Construction has already been underway, and we are looking forward to the enhancements it will bring to the lives of our seniors both now and in the future.







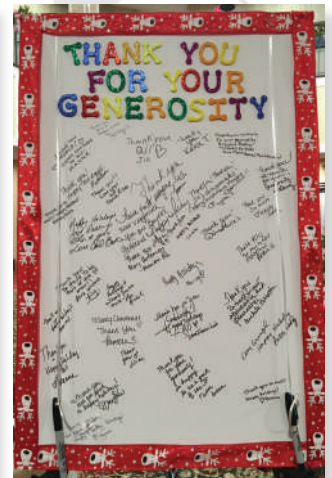
## Lasurdo's Legacy

For the past 4 years, Lasurdo's Legacy has been providing a Celebration of Life Tree plaque for residents who are no longer with us (if a family member does not purchase one within 6 months of their passing). The qualifications are simple: residents must be contract holders and a resident of Jefferson's Ferry for one year. To date, this program has purchased plaques for 92 residents. 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.



## May Your Days Be Merry

Each year, the Residents Council of Jefferson's Ferry collects donations for the staff to present them with a bonus check during the month of December, and this year was no different. In fact, the residents raised a record high total of over \$218,000! Many residents and their grateful family members contributed well over the suggested amount to show their appreciation for the staff going above and beyond the call of duty in 2020. Although the annual holiday party looked a little different this year, the residents still proudly dressed up in their holiday gear and handed out the checks to the staff. Needless to say, it was very much appreciated by all who received this extraordinary token of gratitude.







# 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: *General, Health and Wellness, Resident Assistance, Capital Improvements, Staff Education and Assistance or Journey Toward Renewal.*

**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*

## Nursing Scholarship Fund

Did you know we have a scholarship for new students entering Suffolk Community College's Nursing Program? This is available to active, full-time or regular part-time employees in good standing who have worked at Jefferson's Ferry for a minimum of 12 months and dependent children of employees. Through the Jefferson's Ferry Foundation's **Employee Education and Assistance Fund**, students will be able to receive a \$2,000 scholarship for the year! In 2020, we awarded this scholarship to one high school senior - she was thrilled. Certain criteria apply. If interested, please contact Human Resources at 631-675-5511.



## Employee Education *and Assistance*

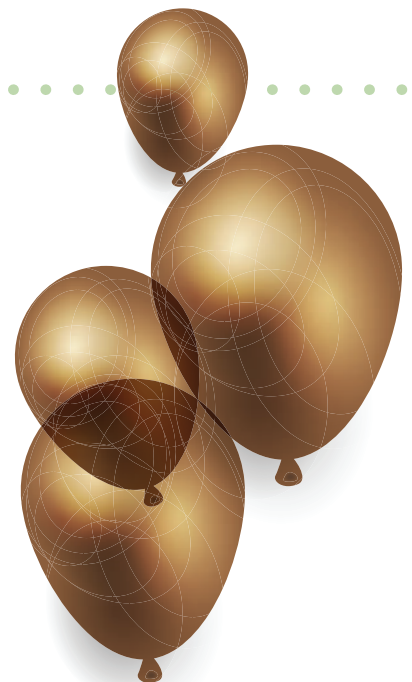
The Jefferson's Ferry Foundation fully supports our staff and their pursuit of education. Through donations made to the Employee Education and Assistance Fund, each eligible staff member has the opportunity to be reimbursed for up to **\$200 towards textbook purchases annually**. Textbooks are a very costly part of education, so as you can imagine, this is very much appreciated by the staff who receive it.

A total of 10 staff members took advantage of this in 2020.

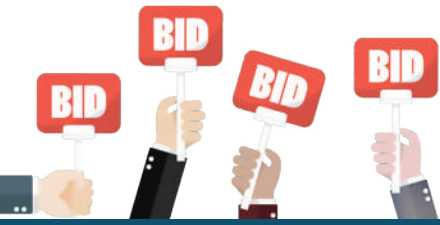
Not only do we provide textbook reimbursement, we also reimburse for tuition if it pertains to your current job description. In 2020, 3 staff members utilized \$2,833 from the **Staff Education and Assistance Fund** to help pay for our staff's education in fields including Human Resources and Nursing.

## Happy Birthday to You!

Did you know the Foundation sends birthday cards to all residents of Jefferson's Ferry? Last year, we hand wrote 364 and distributed to residents the week of their birthday. They really enjoyed receiving them.







## and the Highest Bidder is...

Although we couldn't have a full year worth of employee auctions, we still were able to fit in four. Through the auctions, we raised \$2,043 towards the **Resident Assistance Fund**.

The staff look forward to the auctions every time we have one and miss them when we don't. For the time being, auctions are suspended during construction. In the meantime, we have assembled a list of local organizations to which you can donate. Please note COVID-19 may affect their hours and ability to do pick-ups.

### 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 Rd, Centereach, NY 11720
- Savers - (631) 589-4257  
7001 W Sunrise Highway, Holbrook, NY 11741

## Sharing is Caring

In 2020, we donated several pieces of furniture that were not bid on in our auctions to **Hope House Ministries** and **Angela's House**. They continue to be ever grateful for our contributions and look forward to them.





## 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.



# AmazonSmile

Do you shop on Amazon?

By going to **smile.amazon.com** instead of regular [amazon.com](https://www.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 2020, the Foundation earned \$87 through the AmazonSmile program.

## Community Center Donor Wall Update

In 2020, we added **34** new donors to our **Pioneer** category! This is the entry level on our wall (cumulative giving total of \$1,000-\$2,499 – not including Staff Holiday Fund) where donors can begin their climb to the **Friends of the Foundation** (cumulative gifts totaling \$25,000+). In addition to having many new donors, we had 39 donors climb higher into new categories. We had a grand total of 361 donors for the year 2020! Our sincere thanks to each and every one of you. ***Donors like you are our building blocks for success.***





# FRIENDS OF THE FOUNDATION

## LEGACY

Carol A. Fenter  
Helen and Jerry Lasurdo

## VISIONARY

Debra and Matthew Cody  
GreenPoint Foundation  
Jan Parker

## DIAMOND

Dr. Paul and Claire Baer  
Charles and Mary Chubb  
New Life Management & Development, Inc.  
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Shirley J. Skeldon

## EMERALD

Beverly Birns & Harold Atkins  
Florence Bolatin  
Eastern Portable X-Ray Corp.

In Memory of Arthur W. Hunstein  
In Loving Memory of Rita Kann  
Marjorie and Stephen Levy

Nancy Orth - Beloved Mother and  
Passionate Gardener  
R.W. Rogé and Company, Inc.

Joseph W. Sauls  
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Betty and Mitchell Steinberg

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In Loving Memory of Harry V. Bender  
with Love Dr. & Mrs. Vincent P. Basilice  
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# ANNUAL WALL OF HONOR

## IN APPRECIATION OF CONTRIBUTIONS MADE IN 2020

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Siri Bergheim	Uta Dee	Sue Hagopian	Charles and Lina Lipari	Leonard and Jacqueline Newman	Max Saltzman	Linda Tseng
Michele Berti	Barbara Delaney	William and Marion Halper	Faith Littlefield	Institute	Rosalie Saltzman	Emma Tufano
Elizabeth Ann Beyer	Dolores Dellova	David Harris	Barbara Livant	Andrea Nugent	Joseph W. Sauls	Barbara Twachtman
William Bialkoski	Joseph DeMeo	Joyce Hartigan	Carolyn and Sebastian Livolsi	Robert and Lynda Ober	John Scarpelli	Andrea Tyree
Sheila Bieber	Alice M. Dernbach	Frances Hecht	William Lockwood	Janet S. O'Brien	Howard and Jean Schnell	Bernice Urban
Sheila and Martin Blume	Audrey Derrigan	Linda Heiman	Janet and Milton Lodge	Eleanor Orthun	June Schroeder	Thora Wagner
Rowena Book	Kathleen DeStefano	Robert and Marie Helmerle	June Lohmann	Lester and Judith Paldy	Rosemary Schumann	Madeline Walsh
Patricia Boone	Sheila Deutel	Bob Heins	Beverly Lowitt	Lillian "Lil" Palma	Donald and Priscilla Schwabe	Joan Watson
Mary Bordonaro	Elizabeth B. DiStefano	Frane and Larry Helner	Roy Lukas	Jan Parker	Martha Seaberg	Charles Weber
Charles Borsetti	Distinctive Granite & Marble	Barbara Herrmann	In Honor of Femmy Lundstrom	Jeanette Parker	Helen M. Sedelmeyer	Ruth and Hal Weinreb
Lillian Bowman	Donorwall Design Group	Roslyn Hirsch	Kent Lundstrom	Mercedes Pasqualone	Helen Seeburger	Miriam Weintraub
Ellen Braunstein	Marjorie Dorman	Duane Hix	Scott Lundstrom	Michael Pastier	Stephen Semder	Helene Weissman
Betsy Britton	GinaMarie Dowling	Rosemarie Hohenreiner	Emelia D. Lynch	Miriam Perr	Louise Sevigny	Sigismund and Alice Wielunski
Eleanor Brocia	Barbara Doxey	Richard Holroyd	Anna MacDougall	Kaylin Peterson	Linda Fredel Sharpley	Doris Williams
Ann Bruno	Martin Dunne	Home Instead Senior Care	Catherine Mackay	Jo and Carl Pheffer	Krista and Wayne Shattes	Mary Williams
Douglas Brush	David and Rosalie Edelson	Terryville Homemakers	Frances Magnus	Linda Phillips	Jean Shea	Margaret M. Wisniewski
Susan T. Buckheit	Joyce Edward	G. Jean Horan	Joseph and Michele Mainvielle	Mary Grimes Plosi	Megs Shea	David Wooster
The Buettner Family	Thomas and Dorothy Embler	Lotti Hunstein	The Maloney Family	Elinore V. Plate	Thomas Shea	Wolfgang and Herta Wulff
Mildred Buonaiuto	Engel Brite Emerald Island Supply Company	Alan Hutt	Tom and Kate Maloney	Terryville Homemakers	Caroline Sheinbaum	York Scaffold Equipment Corp.
Jerry Burkhoft	Frieda Englberger	Sal and Corinne Ingrassia	Vito Manzella and Janet Hovnanian	Patricia Ann Plowfield	Sakae Shirane	Drs. Elio and Lynette Zappulla
Noel Burks	Epoch 5 Public Relations	Ruth Jahier	Rose Manzoni	Margaret C. Pols	Lee Simmons	Ira and Barbara Zarett
Dolores Cammarata	Asher Etkin	Jet Sanitation Service Corporation	Richard J. Marlborough	Tom and Naomi Prach	Philip B. Simoni	E. M. Zimmermann
Frank Capuano	Eugene J. Fallon	Margery L. Johnston			Barbara Simons	Mary Zimmermann



Please consider making a gift to any one of our ongoing funds listed below.

# Become a Contributor

Through the Jefferson's Ferry Foundation, there are many ways that you can contribute to making Jefferson's Ferry an even better place to live and work.

## General Fund

A gift to the general fund will allow for the Foundation to apply your gift to the area of greatest need.

## Resident Assistance Fund

The Resident Assistance Fund is an area of great importance to residents of Jefferson's Ferry. By making a gift to this fund, you will be providing financial assistance for residents of Jefferson's Ferry who have run out of money through no fault of their own.

## Health and Wellness Programming

Wellness is a combination of many aspects that strengthen and enhance the mind, body and spirit. A gift made to Health and Wellness Programming will support the entire human experience, encompassing the primary elements of a healthy lifestyle: emotional, intellectual, physical, social, spiritual, occupational and environmental wellbeing.

## Employee Education and Assistance Fund

A gift made to the Employee Education and Assistance Fund provides staff with the opportunity to further pursue education in their field, reimbursement for textbooks and hardship loans in time of need. Often residents use this as a method of giving back to the staff for the care they were provided, as tips are not accepted at Jefferson's Ferry.

## Capital Improvement Fund

Gifts made to this fund will aid in various building projects such as expansions, improvements, and updates in technology.

## Journey Toward Renewal

A gift to the Journey Toward Renewal will help expand our current facility to enhance the lifestyle for current residents and future needs of a whole new senior generation. Updates will include: a state-of-the-art rehabilitation center, more dining options, and renovations in assisted living and skilled nursing to name a few.



# Planned Giving Opportunities

The Jefferson's Ferry Foundation offers many great opportunities to leave your mark on Jefferson's Ferry

## Charitable Gift Annuity

Retain income benefits from the assets you give to Jefferson's Ferry and thus afford a larger gift. When you create a charitable gift annuity or charitable remainder trust, you will receive income, a charitable deduction, and diversify your holdings. You can reduce high tax liability now while gaining additional income.

## Entrance Fee Gift

The entrance fee for most residents can be pledged as an irrevocable gift to the Jefferson's Ferry Foundation. This may result in a substantial tax deduction for people that itemize on their tax return. For residents making this type of bequest, there may be significant tax planning opportunities with no out-of-pocket expense.

## Partnership Interest

Avoid capital gains liability on the transfer of a business or partnership interest. You can contribute the partnership interest or closely-held stock to the Jefferson's Ferry Foundation. You will receive an income tax deduction for your gift.

## Life Insurance

Create a new life insurance policy or donate a paid-up policy you no longer need. This will increase your ability to make a significant gift to Jefferson's Ferry.

## Deferred Gift Annuity

Establish a deferred gift annuity and take a larger deduction at a higher income rate than other life-income gifts.

## Real Estate Gift

Make a gift of real estate to the Jefferson's Ferry Foundation and avoid capital gains tax. Receive an income tax deduction and enjoy the option of a gift that doesn't affect your lifestyle.

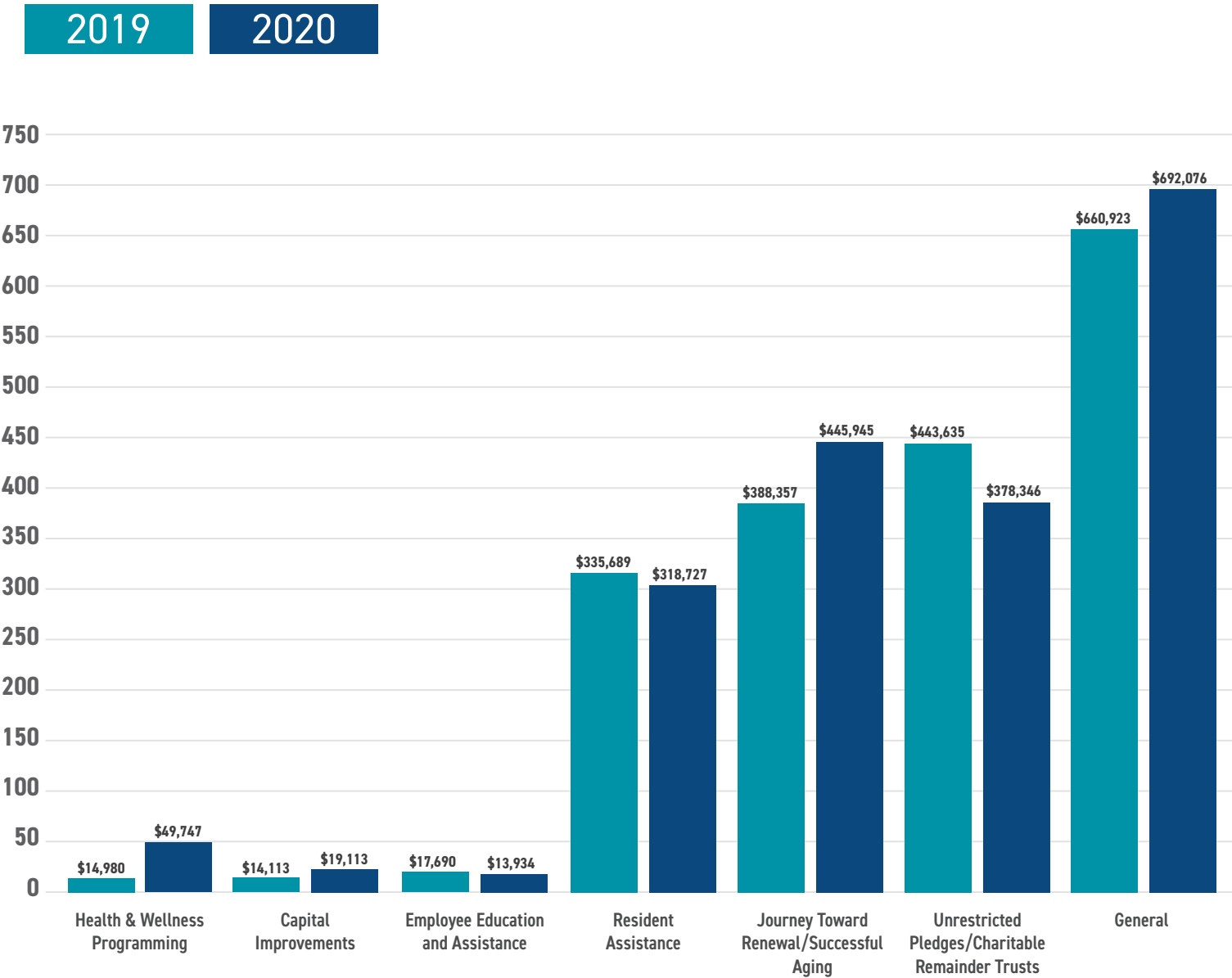
## Charitable Lead Trust

You can reduce gift and estate taxes and control the timing of passing assets to your children, grandchildren, and great-grandchildren. Create a charitable lead trust for a fixed, finite period with the principal going to your heirs. Reduce gift and estate taxes and freeze the taxable value of growing assets before they pass to your family.



# FOUNDATION FUND BALANCES

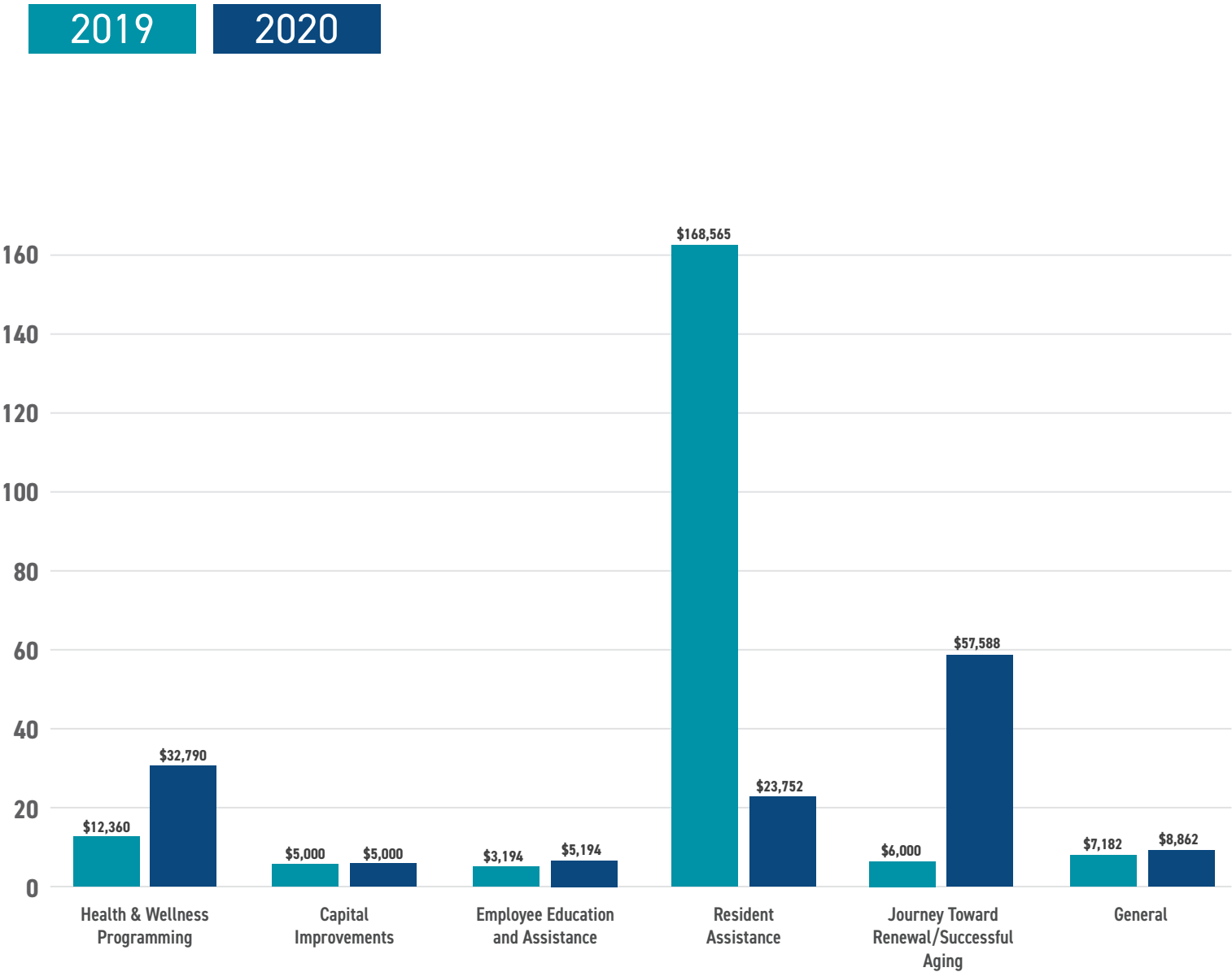
(DECEMBER 31, 2020)



TOTAL NET ASSETS AS OF DECEMBER 31, 2020

**\$1,917,888**

# 2020 CONTRIBUTIONS RECEIVED



**TOTAL CONTRIBUTIONS RECEIVED IN 2020**  
**\$133,186**





— Jefferson's Ferry —  
**FOUNDATION**

One Jefferson Ferry Drive, South Setauket, NY 11720

631.675.5507 | [jeffersonsferry.org](http://jeffersonsferry.org)