



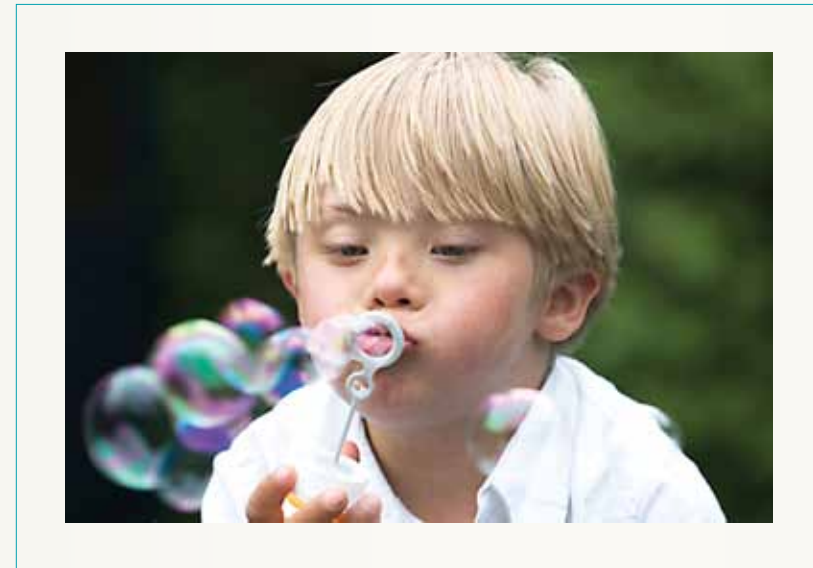
*Building a sustaining
lifelong partnership
with Easter Seals UCP
Horizons Foundation*

Corporate Headquarters:
5171 Glenwood Avenue, Suite 400
Raleigh, NC 27612
www.eastersealsucp.com





*The Easter Seals UCP Horizons Foundation
was created to assure the long-term
sustainability of the programs and services
provided by Easter Seals UCP
North Carolina & Virginia.*



Established in 2000, the Easter Seals UCP Horizons Foundation seeks to further the mission of Easter Seals UCP North Carolina & Virginia, Inc. by perpetuating financial support for the programs and services provided to people managing disabilities and mental health challenges.

The demand for Easter Seals UCP programs and services is growing at a rapid pace, as children and adults living with disabilities and their families want and need access to programs and services that help them live, learn, work, and contribute in their communities.

The Horizons Foundation is building brighter tomorrows through an endowment that provides long-term, ongoing income for existing programs; supplemental funding for expansion of services; and special assistance funding to address the needs of individuals – one person at a time.

Sustaining Our Strength & Bridging the Gap

The strength of Easter Seals UCP lies in the organization's rich history of providing high-quality supports and services that meet people's individual needs. The Horizons Foundation helps sustain this 60-year tradition by bridging the gap in its funding streams caused by an ever-changing economy and subsequent government budget cuts.

Paramount to this cause is a strong endowment that stabilizes resources to ensure that services are available when people need them most. Our objectives for a strong endowment include:

- long-term, stable income streams to support the annual budget;
- reduced dependency on government and insurance funds;
- creation of a safeguard against inflation and other economic downturns;
- supplemental funding for program expansion and innovation;
- seed money for program innovations.

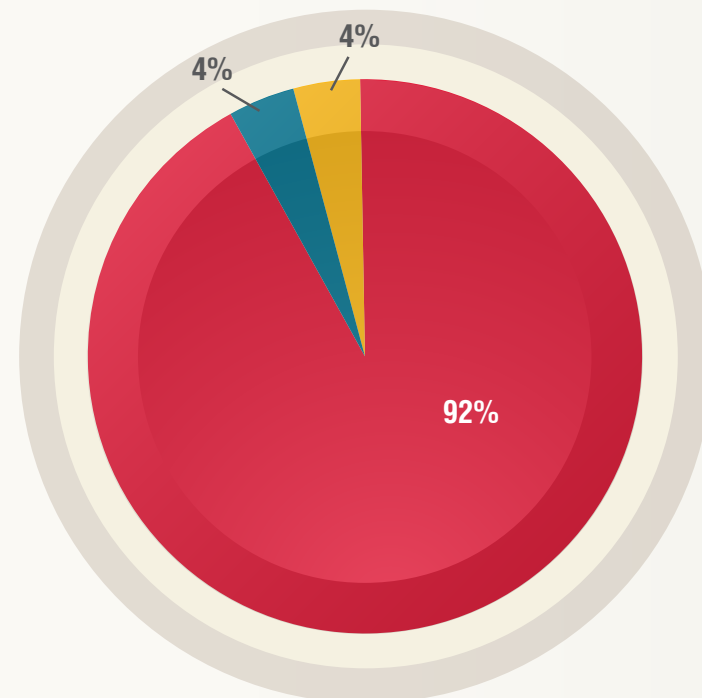


Just as Easter Seals UCP transforms the lives of people living with disabilities, the Horizons Foundation resources help the organization become less dependent on government funding and more responsive to the emerging needs of those we serve today, and in the future.

Easter Seals UCP receives the majority of its funding from state and local government agencies, Medicaid reimbursements, and some insurers. However, even with these supports, the individuals we serve do not always receive the funding needed to cover the cost of providing services. Also, to ensure that the necessary care is provided in these instances, Easter Seals UCP makes up the difference in those costs with contributed dollars. Your gift to the Horizons Foundation maintains critical levels of service during periods of fluctuating funding by the government.

Funding Sources

- Government
- Contributions (Net)
- All Other



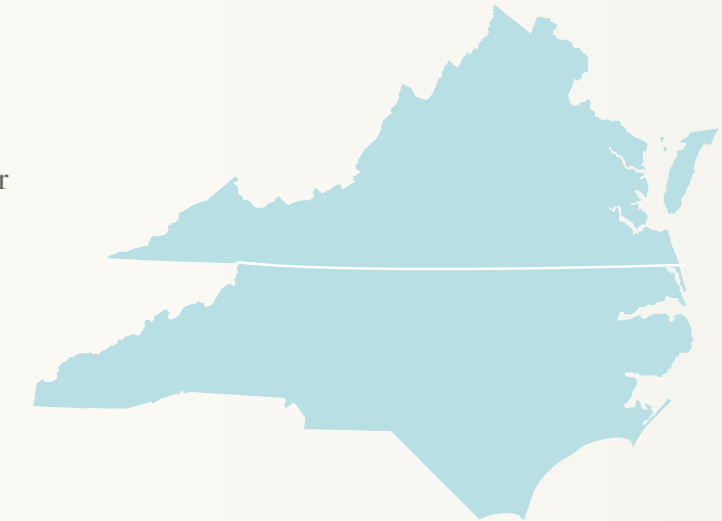
Who We Are

Easter Seals UCP North Carolina & Virginia is a lifelong partner to people managing disabilities and mental health challenges.

Children receive early intervention, education, and therapeutic services that prepare them for success in life.

Families rely on Easter Seals UCP to be a trusted partner for support and access to resources in their communities.

Adults can choose where they want to live and find meaningful opportunities to work or volunteer their talents and give back to their communities.



Our Mission is...

to create opportunities, promote individual choice, and change the lives of people with disabilities by maximizing their individual potential for living, learning, and working in their communities.

Easter Seals UCP delivers more than 2.2 million hours of quality support and services to more than 17,000 children and adults with disabilities and mental health challenges.



Supporting Children, Families, and Adults

Celebrating Sophie's Differences

When Sophie's family realized that their daughter was late in reaching her developmental goals and that she would likely have challenges for the rest of her life, they didn't know where to turn. The family searched for a pre-school that would address these challenges, including helping Sophie learn to communicate. They found an Easter Seals UCP Children's Center in their community. At the center, not only was Sophie accepted for her differences, she was celebrated for who she was. And not long ago, at the end of a therapy session, Sophie spoke her first words: "all done."

Easter Seals UCP Inclusive Children's Centers provide safe, caring, and challenging educational environments for children of all abilities - where families managing disabilities are empowered.

Ja'Ravion's "Forever Family"

Sammie and Lawanda Clemmons became a licensed foster family because they want to give children with disabilities a nurturing environment in which to live and grow. One week after receiving their foster family license, they welcomed six month-old Ja'Ravion into their home. Ja'Ravion's medical needs were severe. In fact, he was already on hospice's end-of-life candidate list. The Clemmons family never gave up hope and were thankful for each day they might have with Ja'Ravion.

Today, Ja'Ravion is a happy and thriving three year-old. After being adopted by the Clemmons, he lovingly refers to them as his "forever family." Easter Seals UCP's Therapeutic and Family Foster Care places hundreds of children in the loving care of families like the Clemmons.

John's Power of Choice

For years, John struggled with schizophrenia and drug and alcohol abuse. John became clean and sober while managing his mental illness and is currently employed by Easter Seals UCP as a Peer Support Specialist. John uses his experiences to help others in need. "There are lots of things in life that we cannot control," says John. "But, I believe that we all have the power of choice. I chose to seek the support of Easter Seals UCP, and that has allowed me to be a productive member of society."

Easter Seals UCP's Mental Health services provide children, families, and adults struggling with mental health challenges a support system to address their challenges.



Creating A Legacy

The Easter Seals UCP Horizons Foundation provides individuals, corporations, and foundations with a wonderful vehicle through which they can make a significant investment and continue to build brighter futures for people managing disabilities and mental health challenges.

A leadership gift will help sustain the supports and services on which people with disabilities have come to rely. Your gift to the endowment might include cash, stocks, payroll deductions, bequests, Charitable Gift Annuities, and charitable trusts.

- Restricted Major Gifts or Planned Gifts greater than \$50,000 can be directed into the Easter Seals UCP Horizons Foundation as a named fund or restricted fund.
- Unrestricted Outright Gifts or Planned Gifts less than \$50,000 are directed to the General Fund of the Easter Seals UCP Horizons Foundation.
- Donor Gifts of less than \$50,000 can be pooled in honor or memory of an individual(s) or be applied to an existing named fund.

No investment is too small, and every gift counts.

"Everyone deserves a chance to live up to their potential. Easter Seals UCP is helping my son do that."

Allison Schweizer, parent of "Scooby" Luke, a student at the Easter Seals UCP Children's Center in Charlotte



Preparing the Ultimate Gift

A life of caring and giving is a legacy for which anyone can be proud. Our legacy speaks to the lessons we've learned in life, the values by which we have lived and our hopes and dreams for the future. Giving the Ultimate Gift is an extension of our legacy, which makes a profound impact far beyond our lifetime.

Ann McCain exemplifies a life of caring and giving. A retired kindergarten teacher, Ann spent her career teaching children the building blocks for a successful life. Ann became friends with Nancy, first as a parent whose two children were taught by Nancy, and then as a colleague. They often talked about Nancy's son, Sam, who has cerebral palsy, and what the future would hold for him. Although Sam's parents are no longer living, they lived to see Sam settled in a supportive living environment where caring Easter Seals UCP staff help him to live the life he chooses. Ann's involvement in Sam's life led her to become an active supporter of Easter Seals UCP.

A long time volunteer and donor, Ann's desire is to ensure every dollar raised is fully maximized to provide meaningful supports to Sam and indeed, all who have special needs. "It has been my privilege to have met many of the people and their families whom Easter Seals UCP serves," says Ann. "It would be the greatest of tragedies if, for lack of funding, even one person could not receive the services he or she needs." That is why Ann included the Easter Seals UCP Horizons Foundation in her Will. "I want my gift to grow, to be a gift that keeps on giving and to know that Sam and all those with special needs served by Easter Seals UCP, will have the care they need for life."

The Ultimate Gift is the kind of forward-thinking gift that makes a considerable difference in the future; that magnifies Easter Seals UCP's ability to fulfill its mission for years to come; and, that multiplies the donor's personal satisfaction. Ann believes that, "growing the Easter Seals UCP Horizons Foundation is urgent and important!"

*I want my gift
to grow, to be a
gift that keeps
on giving...*

Sample Bequest Language for the Easter Seals UCP Horizons Foundation

These samples of bequest language are intended as examples only and should be included in your Will(s), Codicil(s) or Trust(s) only with the advice and assistance of your attorney.

- A. **Outright Bequest:** "I give _____ (cash, securities, real estate, artwork, etc.) to the Easter Seals UCP Horizons Foundation, Incorporated, Raleigh, North Carolina. This bequest shall be used for (or to endow) the (named fund, unrestricted, etc.)."
- B. **Rest and Residue Clause:** "After my specific bequests have been fulfilled, I give, devise, bequeath and appoint all the rest and residue of my estate, where so ever situated and of whatever nature to the Easter Seals UCP Horizons Foundation, Incorporated, Raleigh, North Carolina. This bequest shall be used for (or to endow) the (named fund, unrestricted, etc.)."
- C. **Percentage of Estate Clause:** I leave ___ percent (___%) of my estate to the Easter Seals UCP Horizons Foundation, Incorporated, Raleigh, North Carolina. This bequest shall be used for (or to endow) the (named fund, unrestricted, etc.)."
- D. **Tax Free Clause:** "I leave the amount of my estate which cannot pass free of state or federal taxes to the Easter Seals UCP Horizons Foundation, Incorporated, Raleigh, North Carolina. This bequest shall be used for (or to endow) the (named fund, unrestricted, etc.)."
- E. **Contingency Provision Clause:** "In the event my (spouse, daughter, son, friend — full name) shall predecease me, I leave their share to the Easter Seals UCP Horizons Foundation, Incorporated, Raleigh, North Carolina. This share shall be used for (or to endow) the (named fund, unrestricted, etc.)."

Easter Seals UCP Legacy Society Recognition Levels

- Legacy of Ability — Gifts of \$1,000 or more
Legacy of Dignity — Gifts of \$2,500 or more
Legacy of Opportunity — Gifts of \$5,000 or more
Legacy of Empowerment — Gifts of \$10,000 or more
Legacy of Independence — Gifts of \$25,000 or more



Legacy
Society 

Stock Gift Information

For all planned gifts, bequests, or endowment gifts funded with stock, please provide the following information to your stock broker:

DTC Routing Number: 0141

Account Number: 5592-3582

Account Manager: Mike Blair -- CAPTRUST Financial Advisors (704) 927-0360 Or (800) 216-0645

In order to help us better facilitate and track the stock transfer, we respectfully request that your broker contact CAPTRUST and provide the following information:

Name of Donor

Name of Stock to be Transferred

Amount of Shares being Transferred

Planned Giving Information

To provide Easter Seals UCP North Carolina and Virginia with a sustaining Legacy Gift in your will or other estate plans, please use the following legal name, address, and Tax ID#:

The Easter Seals UCP Horizons Foundation, Incorporated
(The Endowment of Easter Seals UCP North Carolina & Virginia, Incorporated)
5171 Glenwood Ave, Suite 400
Raleigh, NC 27612
Tax ID #: 56-2172655



For questions regarding Easter Seals UCP Horizons Foundation or to make a gift, please call 1-800-662-7119. For more information about Easter Seals UCP and its programs and services, please visit our website at: www.eastersealsucp.com.

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