



North Carolina & Virginia

## Easter Seals UCP Horizons Foundation



*Building brighter tomorrows for children and adults living  
with disabilities in North Carolina & Virginia.*

## Easter Seals UCP Horizons Foundation

The Easter Seals UCP Horizons Foundation was started by former Board President of United Cerebral Palsy of North Carolina, Mort Congleton in May of 2000. After the merger of UCP North Carolina and Easter Seals North Carolina, the foundation was renamed The Easter Seals UCP Horizons Foundation.

The Horizons Foundation was established to further the mission of Easter Seals UCP North Carolina & Virginia, Inc. and to ensure that Easter Seals UCP will continue to provide high quality programs and services to children and adults living with disabilities in North Carolina and Virginia for decades to come. The Horizons Foundation is *building brighter tomorrows* through an endowment that will provide long term, ongoing income for existing Easter Seals UCP programs, supplemental funding for expansion of services, and special assistance funding to address the needs of individuals...*one person at a time.*

The demand for Easter Seals UCP programs and services is growing at a very 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 and work in their communities—thus enabling them to become more productive members of their communities through out North Carolina and Virginia.



*“The Easter Seals UCP Horizons Foundation was created to assure the success of the numerous programs falling under the auspices of Easter Seals UCP and to aid the many families struggling with associated financial burdens of living with disabilities.”*

**Mort Congleton**  
CFO, The Smith Sinnett Associates  
Founder of the  
UCP Horizons Foundation

Easter Seals UCP receives the majority of its funding (68%) from state and local government agencies, and Medicaid reimbursements. However, even with government and insurance funding, many of Easter Seals UCP's consumers do not receive the full funding for which they are eligible. In order to ensure that necessary care is provided in these instances, Easter Seals UCP makes up the difference in costs. No consumer or consumer family is turned down for services based on their family income. Due to this reliance on governmental and insurance funding, Easter Seals UCP is highly exposed to the health of the economy and subsequent government budget cuts, and changing reimbursement rates and reallocations.

### Sustaining Our Strength & Bridging the Gap

The goals of the Easter Seals UCP Horizons Foundation are to sustain Easter Seals UCP's life-changing programs while bridging the gap in its funding streams. Building up the endowment is paramount to stabilizing the finances of Easter Seals UCP and ensuring the longevity of its programs and services. The objectives of growing the endowment are to provide:

- a long term, stable income stream to support the annual budget;
- ongoing income for existing programs and special projects;
- reduced dependency on government and insurance funds in our annual budget;
- a financial hedge against inflation and other economic hard times;
- protection in case of emergencies;
- supplemental funding for program expansion;
- leverage for attracting other resources

Just as Easter Seals UCP transforms the lives of people living with disabilities and enables them to become more independent, growing the Horizons Foundation will enable Easter Seals UCP to become more financially independent and ultimately better to fulfill its mission far into the future.

## Easter Seals UCP North Carolina, Inc.

*Easter Seals UCP's 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 North Carolina & Virginia, Inc. is a statewide non-profit organization that provides supports and services to over 17,000 North Carolina and Virginia children and adults living with disabilities and their families. These children and adults have disabilities such as cerebral palsy, autism, epilepsy, mental retardation, developmental disabilities, acquired injuries, aging-related issues, and/or mental health diagnoses. Programs and services include:

- early childhood education and outreach;
- Camp Easter Seals UCP;
- in-home and community based periodic supports;
- supported employment;
- therapeutic foster care;
- respite care;
- residential living supports;
- community and clinical mental health services;
- crisis services;
- disability benefits counseling;
- special assistance



Through the years, Easter Seals UCP has helped North Carolina and Virginia become a better, more welcoming community for children and adults with disabilities. Easter Seals UCP has proactively created services that support inclusion — enabling more people with disabilities to live, learn, work and play in their own communities. Children are learning their first words, families are receiving much needed respites, individuals are achieving their goals, and adults are working in meaningful jobs.

We have three areas of **primary focus**:

- Child
- Family
- Adults

We provide these through our **major service lines**:

- Individual and Community Supports;
- Early Childhood Services;
- Child Placement Supports and Services;
- Supported Employment;
- Community and Clinical Mental Health Services.

*“Rarely have I had the opportunity to observe a non-profit organization provide so much in an area where the assistance is so greatly needed and appreciated. Easter Seals UCP effectively fulfills its promise of providing excellent therapy, education and training for children and for promoting economic and social independence for adults with severe developmental disabilities.”*

**Jim Goodman**

*President and CEO, Capitol Broadcasting Company*  
Founding Member of Easter Seals UCP’s Horizons Foundation



## Primary Focus Areas of Easter Seals UCP

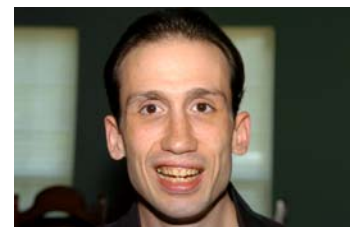
### Child and Family Services

Alison's mom, Rachel, noticed that something wasn't quite right when Alison wasn't sitting at 6 months. After many trips to several doctors, Alison was diagnosed with cerebral palsy. Soon after her diagnosis, her parents sought help from Easter Seals UCP's Early Childhood Outreach for early intervention and education. Shortly thereafter, Alison was enrolled at the Easter Seals UCP Children's Center in Wilmington. With Easter Seals UCP, all of Alison's therapies are integrated into her time at school, which means less time spent in the car on the way to appointments. Her parents know that Alison is loved and well-cared for by highly qualified therapists, teachers, and staff. But best of all, Alison is around her new friends, both children with and without disabilities.



### Inclusive Communities

In his late teens, Josh sustained a severe head injury as a result of an auto accident which had involved drinking and driving. The accident left him with a traumatic brain injury and significant cognitive impairment. This type of life altering experience would have ruined the life of a lesser man, but Josh chose to turn his personal tragedy into an inspiring message that would benefit other young people. After receiving therapies at home from Easter Seals UCP, Josh made such vast improvements that his doctors are still amazed. Now, every year Josh and his mom, Peggy, travel the state of North Carolina so Josh can speak to students about the dangers of drinking and driving. He does not shy away from telling the students about the mistake he made in his life by drinking and driving, but he also makes sure that they know his life is by no means over because of that mistake.



### Employment

Brent is a 24-year old man with a type of autism called Williams Syndrome. Often children with Williams Syndrome require special education whereas adults need ongoing support to live and work in the community. With the help of Easter Seals UCP's Supported Employment, Brent was able to get a job that he loves, working at a Charlotte medical center. Becoming a tax payer is something that Brent and his family take great pride in. As a result of his employment, Brent is economically self-sufficient and no longer depends on disability/supplemental income. He was also able to move into his own apartment last year, which he shares with a roommate. Through his wonderful relationship with Easter Seals UCP, Brent has a newfound independence that he cherishes.



## Funding Opportunities

The Easter Seals UCP Horizons Foundation provides individuals, corporations and foundations with a wonderful vehicle through which they can make a significant investment that will help Easter Seals UCP continue to build brighter tomorrows for children and adults living with disabilities in North Carolina and Virginia. These leadership gifts will ensure that Easter Seals UCP will be able to continue to provide the life-changing programs and services that mean the world to these children and adults. Gifts to the endowment include cash, stocks, payroll deductions, bequests, Charitable Gift Annuities, and charitable trusts.

*These gifts to the Horizons Foundation can be either unrestricted or restricted.*

- Unrestricted Outright Gifts or Planned Gifts less than \$50,000 are directed to the General Fund of the Easter Seals UCP Horizons Foundation.
- 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.
- 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.



*The children that I have witnessed during my years of working with Easter Seals UCP constantly overwhelm me with their determination and courage to succeed whether it be in physical therapy, daycare, on-the-job training or in their day-to-day lives. My daughter teaches me everyday that there are very few limits to what a physically challenged child can achieve with the assistance, guidance and understanding provided by the myriad of Easter Seals UCP programs.”*

**Mike Schultze**  
Cranford, Schultze, Tomchin & Allen, P.A.  
Founding Board member & current Chair of  
Easter Seals UCP Horizons Foundation

## Stock Gift Information

To make a gift of stock to the Easter Seals UCP Horizons Foundation, 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 you have your broker call or email Chip Bradford at CAPTRUST (704) 343-4506 or [chip.bradford@captrustadvisors.com](mailto:chip.bradford@captrustadvisors.com) and provide him with the following information:

*Name of the Donor*

*Name of the Stock to be Transferred*

*Amount of Shares being Transferred*

## Planned Giving Information

To provide Easter Seals UCP North Carolina 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)*  
**5161 Glenwood Ave, Suite 400**  
**Raleigh, NC 27612**  
**Tax ID #: 56-2172655**



## 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.).”

## Presidents' Council

For those individual donors who make a gift of \$1,000 or more in a given fiscal year to the Easter Seals UCP Horizons Foundation, they will be recognized as Presidents' Council members. This leadership group plays an extremely significant role in helping Easter Seals UCP fund its life-changing programs and services each year.

### *Presidents' Council Recognition Levels*

*Ability — Gifts of \$1,000 or more*

*Dignity — Gifts of \$2,500 or more*

*Opportunity — Gifts of \$5,000 or more*

*Empowerment — Gifts of \$10,000 or more*

*Independence — Gifts of \$25,000 or more*

## Easter Seals UCP Legacy Society

For those individuals who have indicated that they have named Easter Seals UCP as a beneficiary in their will or other estate plans, they will be recognized as members of the Easter Seals UCP Legacy Society. Giving levels will apply at the time of distribution.

### *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*



North Carolina & Virginia



**Easter Seals UCP Horizons Foundation**  
**Board Members**

**Mike Schultze — Chair**  
*Cranford, Schultze, Tomchin and Allen, P.A.*  
*Charlotte, NC*

**C. Mark Holt**  
*Kirby & Holt, LLP*  
*Raleigh, NC*

**Don Donadio**  
*Womble, Carlyle, Sandridge & Rice*  
*Raleigh, NC*

**Ken Cameron**  
*Acosta Sales*  
*Charlotte, NC*

**Meg Wagner-Diggs**  
*Toano, VA*

**Tracy Watkins**  
*Charlotte, NC*

**Easter Seals UCP Staff Members:**

**Connie Cochran**  
*President & CEO*

**Bob Frazier**  
*Chief Development Officer*

If you have questions regarding the Easter Seals UCP Horizons Foundation or making a gift to the Horizons Foundation, please contact Bob Frazier at 919-865-8634 or [bob.frazier@nc.eastersealsucp.com](mailto:bob.frazier@nc.eastersealsucp.com).

For more information about Easter Seals UCP and its programs and services, please visit our website at:  
[www.nc.eastersealsucp.com](http://www.nc.eastersealsucp.com)





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***Easter Seals UCP North Carolina & Virginia, Inc.***  
***5171 Glenwood Ave, Suite 400***  
***Raleigh, NC 27612***  
**[www.nc.eastersealsucp.com](http://www.nc.eastersealsucp.com)**

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