

**West Haven Community House**

## ***West Haven Community House***

227 Elm Street, West Haven, CT 06516

203-934-5221 Fax: 203-937-9052

[www.whcommunityhouse.org](http://www.whcommunityhouse.org)

---

## **The West Haven Community House Endowment Fund**

Thank you for your interest in donating to the West Haven Community House Endowment Fund.

The West Haven Community House Endowment Fund receives all contributions and transfers of endowment philanthropic funds and transfer of other monies, properties, and assets of charitable, scientific, educational, and religious agencies, and of private foundations. The Fund is managed and administered by the Endowment Committee and distributions are made for uses and purposes, all in accordance with the principles and policies of the West Haven Community House.

**Purpose:** The purpose of the Endowment is to conduct, promote and carry on activities which support the mission of WHCH. The Endowment Committee acts as the instrument of WHCH in receiving, administering and allocating funds and property for capital and special purposes of WHCH.

For a donation to an established Named Fund, please fill out this form and send it to:

West Haven Community House  
227 Elm St.  
West Haven, CT 06516

Attn: Development Office Or email to [info@whcommunityhouse.org](mailto:info@whcommunityhouse.org)

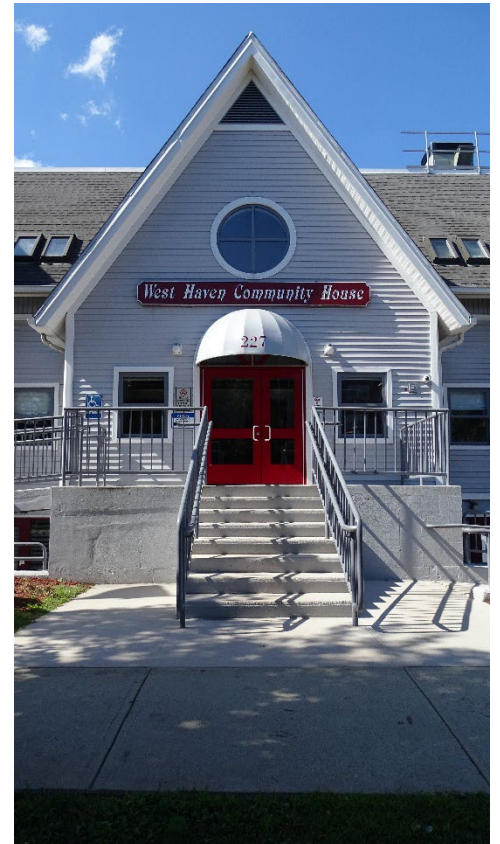




## West Haven Community House

### *Named Endowment Funds*

- Robert F. DeFonce Fund
- Eugene & Helen Dorsi Fund
- Eder Brothers Fund
- Jill Fleming Fund
- Kenneth S. Ginsberg Fund
- Heffernan Family Fund
- Patricia Herbert Fund
- Beatrice Howell Fund
- John & Dodie Ireland Fund
- Mary Jane Kelly Fund
- Jean & Nathan London Fund
- Randolph A. Maitz Fund
- Sharon Martin Fund
- Eugene McCarthy Fund
- Pvt. Stephen McHugh Fund
- Scott Merriam Fund
- Sophia O'Connor Brown/ Community Connections Fund
- Dr. John Onofrio Fund
- Ralph Paolillo Fund
- Helen & Nello Pinzi Fund
- Roberta Saunders-Gray Estate Fund
- Peter Schwartz Fund
- James Shanbrom Family Fund
- Sacco-Monaco Fund
- Scanell- Torello Fund
- Patty Stevens Family Fund





# Creating a Legacy

## West Haven Community House Named Funds

Please consider creating a named fund in honor or in memory of someone. A named fund can be created with a contribution starting at \$5,000. When you are ready, please contact the Development Office with the information below.

Named Funds are recognized annually at a meeting of the Board of Directors in June.

### FUND OWNER/DONOR INFORMATION

First Name \_\_\_\_\_

Last Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Email \_\_\_\_\_

Enclosed is my tax-deductible Named Fund gift of \$ \_\_\_\_\_

The Fund Name will be:

In Honor of: \_\_\_\_\_

In Memory of: \_\_\_\_\_

Other: \_\_\_\_\_

Short Description

\_\_\_\_\_  
\_\_\_\_\_

Funds should be restricted for the following program:

None – Overall use by West Haven Community House

Children & Youth Services     Community Connections     Head Start

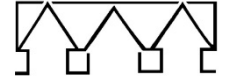
SECONDARY CONTACT:

NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_



# Leaving a Charitable Remainder Trust (CRT) Benefitting the West Haven Community House



Giving to the West Haven Community House Endowment Fund via the creation of a personal Charitable Remainder Trust allows the donor to receive income for the rest of their life, knowing that whatever remains will benefit the community via the good work done by the West Haven Community House.

## How it works

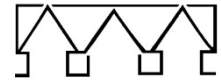
- You transfer cash, appreciated stocks, real estate, or other assets into a trust set up by your attorney or accountant.
- You receive an immediate charitable tax deduction for the charitable portion of your trust.
- The trust pays you or a beneficiary you designate regular income payments.
- Upon the beneficiary's death or after a defined period of years, the remaining assets in the trust transfer to the West Haven Community House Endowment Fund.
- We set up a fund in your name, in the name of your family or business, or in honor of any person or organization that you choose.
- We handle all the administrative details after the fund is established.
- Your gift is placed into the West Haven Community House Endowment Fund that is invested over time. Earnings from the fund support the ongoing work of the agency. Your gift - and all future earnings from your gift - is a permanent source of community capital, helping to do good work forever.

## More Benefits

You may choose to receive a fixed income or one that changes with market conditions - income from the Charitable Remainder Trust you establish may add up to more than the interest and dividends you earned from holding the assets. You can use it to supplement your own lifestyle or that of someone other than yourself: a sibling, a dependent parent, or a friend. You can pick one of these options for your charitable remainder trust:

- **Annuity trust** pays you a fixed dollar amount.
- **Standard unitrust** pays you an amount equal to a fixed percentage of the net fair market of the trust and is recalculated annually.
- **Net income unitrust** pays you the lesser of the fixed percentage specified by the trust agreement or actual trust income; some net income unitrusts allow you to make up deficiencies in previous years.
- **Flip unitrust** is a net income unitrust that converts to a standard unitrust upon a triggering event, such as the sale of an asset used to fund the trust.

## Stock Transfers



The Transfer of Stocks are coordinated between the WHCH Finance Department and The Community Foundation for Greater New Haven.

Please notify the Development Office of your intentions. The information you will need is :



The **COMMUNITY** Foundation *for* Greater New Haven

## **Electronic Transfer Instructions for Stock Gifts**

We appreciate your interest in making a gift of securities through The Community Foundation *for* Greater New Haven. Following the instructions below will help ensure that your gift is processed in a timely manner and accurately directed to your desired use.

1. Prior to transferring shares, please contact The Community Foundation and provide the following information:
  - a. Name of your broker and firm assisting with the transfer
  - b. Stock name and number of shares
  - c. How you would like this gift to be used (i.e., the fund or purpose to which the gift should be directed for the West Haven Community House)
2. Please advise us, directly or through your broker, when the stock transfer is complete. Once the gift is received and processed by The Community Foundation, a gift acknowledgement letter will be sent to you.

### ***The Community Foundation for Greater New Haven Contact Information:***

Ms. Linda Estacion

Director of Donor Services and Development Operations Phone Number: 203-777-7069

Email: [lestacion@cfgnh.org](mailto:lestacion@cfgnh.org)

### ***The Community Foundation for Greater New Haven Brokerage Account Options:***

Merrill Lynch/Bank of America Account

Number: 81204182

DTC Number: 8862

Contact Person: Alex Santacroce Phone

Number: 203-789-2405

Fax Number: 203-826-2248

UBS

Account Number: LH39063 DTC

Number: 0221

Contact Person: Denise Rasicot Phone

Number: 203-498-3327

Fax Number: 855-249-231

