

MORE INFORMATION

Approximately 1 in 4 adults and 1 in 5 youth across the U.S. will experience mental illness or a mental health concern during their lifetime. By 2020, it is expected that behavioral health disorders will be the #1 cause of disability worldwide. It has never been more imperative that mental health services be accessible to our community members.

If a person already has a will or living trust, it is very easy to amend it to include a bequest to a charity with a simple codicil. Kennebec Behavioral Health has sample bequest and codicil language that is available to you upon request and on our website www.kbhmaine.org/give.

All gifts are managed through Kennebec Mental Health Association's Foundation. The federal tax ID for this corporation is 61-1419904.



LOCATIONS & CONTACT

Waterville Clinic & Administrative Offices

67 Eustis Pkwy., Waterville, ME 04901
207-873-2136

Augusta Clinic

66 Stone St., Augusta, ME 04330
207-626-3455

Skowhegan Clinic

5 Commerce Dr., Skowhegan, ME 04976
207-474-8368

Winthrop Clinic

736 Old Lewiston Rd., Winthrop, ME 04364
207-377-8122

To contact the clinics above,
Call **1-888-322-2136** or Fax **1-800-638-3455**

Have questions? Contact us:

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www.kbhmaine.org/give

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PLANNED GIVING ~JUST THE BASICS~



Planning today to make a
difference tomorrow.





TYPES OF PLANNED GIFTS

Gifts are usually in one of the following forms:

- Gifts of stock
- Bequests
- Beneficiary designation (such as a gift of retirement assets)
- Personal property
- Real estate
- Remainder gifts (the leftover value of a person's estate once all other obligations are met)



WHAT IS A PLANNED GIFT?

A planned gift is simply a gift that is planned now and realized at a future date.

HOW DOES IT WORK?

Most planned gifts are made as part of a person's overall financial planning. If you are thinking about a planned gift, the best place to start is by having a conversation with your financial advisor, accountant or attorney. They will be able to guide you and provide advice around financial and estate planning matters.

Your interest in Planned Giving for Kennebec Behavioral Health is appreciated! You can make a transformation gift that costs you nothing today!

Bequests are gifts made through a will or living trust. This is a great option for giving to your designated non-profit because it allows you to make a meaningful legacy gift to a cause that you strongly believe in, and it costs nothing during your lifetime. It is also revocable, so you are not locked into a decision that cannot be changed.

Beneficiary designations are simple to give, easy to arrange and usually do not require an attorney. They usually just require that the donor sign a simple beneficiary designation form which can be obtained from the plan or account administrator. One can designate all or part of these assets as a planned gift:

- Retirement plan
- Insurance policy
- Bank account
- Brokerage account

WHAT DIFFERENCE WILL MY GIFT MAKE FOR KBH?

It depends on what YOU want!

You can decide how your gift is used. Here are a few options:

- Unrestricted. This means KBH can decide on how best to use funds. KBH's Board of Directors provides oversight and must approve how funds are used.
- Restricted to a specific program or service at KBH.
- Restricted to a specific population (children, elderly, etc.)
- Restricted to a specific location (Kennebec County, Somerset County, etc.)
- Permanently restricted to our Endowment. KBH would only use the interest gained and leave the corpus (original amount of money) in our investment account.