



THE PINNACLE SOCIETY

A Legacy that

CHANGES LIVES



Since Hillside was founded in 1837, many things have changed—but not the painful multigenerational effects of poverty, trauma and neglect on children, families and whole communities. Hillside is dedicated to breaking that cycle through innovative programs that serve thousands of vulnerable youth and families annually, and strengthen individual lives every day.

Hillside delivers solutions, not just services: our work is rooted in evidence-based practices that create the best possible outcomes, for the most people, with the highest value. Visionary philanthropy is a key element in ensuring Hillside’s ability to support the evolving needs of tomorrow’s families.

A Legacy of **LONGEVITY**



When **Bruce Bates** talks about the Pinnacle Society, he looks to the future. “When I think about legacy, I think about what I can do with my wealth to help others after I am gone,” says Bruce, retired Senior Vice President at Morgan Stanley. “Of course I think of my wife and my family. But beyond that, I feel that we have a responsibility to help children in our community who were born into circumstances that put them at a disadvantage. These are the kids who need our help the most.” Bruce has supported Hillside for more than 25 years, and he has been a member of Hillside’s Planned Giving Founders Council for nearly a decade.

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Hillside created the Pinnacle Society to recognize the unique philanthropic vision of those individuals and families who understand the importance of our agency’s long-term fiscal sustainability. Through planned gifts—including bequests, trusts, life income gifts and other estate planning tools—our donors create a path to long-term benefits for children and families in need.

By making a planned gift to Hillside and becoming a member of the Pinnacle Society, you help ensure that Hillside’s vision—to help youth and families thrive and succeed in their communities—can be sustained for generations to come.



A Legacy to REMEMBER



Peg Ferber has a very personal reason for giving to Hillside through the Pinnacle Society. “I actually grew up in foster care. My life was very unstable when I was a young girl, but at the age of 9 I found the people who, to this day, I call my parents,” she says. “Joining the Pinnacle Society is part of recognizing the blessings that were given to me and making sure that children and other foster families are cared for. Think about your own childhood: If you were blessed with a strong family, recognize that not every child is. For those of us who have the means to help others, we have an obligation to share, to give, to help make this world a better place today and after we are gone.”

Ways to Leave Your Legacy

Name Hillside as a beneficiary of your Will: Defer a gift until after your lifetime by leaving a bequest in your will naming the Hillside Foundation as beneficiary (designate a specific amount, a percentage, or a share of the residue). This planned gift can be exempt from federal estate tax, and allows you control over your assets during your lifetime.

Enter into a Charitable Gift Annuity contract: By partnering with the Hillside Foundation on a charitable gift annuity, you can supplement income with steady payments that are partially tax-free. This gifting option provides tax-favored fixed payments for the estimated life expectancy of income beneficiaries, as well as current and future savings on income taxes.

Create a Charitable Remainder Unitrust to benefit Hillside: This vehicle pays a fixed percentage of the trust’s assets as revalued annually. A charitable remainder unitrust provides income for life, an immediate income tax charitable deduction and a long-term hedge against inflation.

Create a Charitable Lead Trust to benefit Hillside: This gifting vehicle pays a fixed or variable income to Hillside for a specific term of years; thereafter, the balance is given to loved ones. If your goal is to reduce gift and estate taxes on assets you bequeath to family, a charitable lead trust will help by reducing your taxable estate while enabling property to be kept by family, often with reduced gift taxes.

Name Hillside as beneficiary of appreciated Stock: Eliminate taxes on capital gains by contributing appreciated stock or other securities to the Hillside Foundation. You will receive an immediate charitable deduction for the full fair market value.



A Legacy of INNOVATION

Barbara Conrad has a unique perspective about Hillside's impact. Barbara served Hillside and Crestwood Children's Center in various capacities for over 30 years, so joining the Pinnacle Society seemed inevitable. "Traditional sources of funding aren't as readily available as they used to be, and that private funding helps drive innovative solutions that might not otherwise be explored. Through the Pinnacle Society, I know my gift will enable Hillside to create new services—and positive outcomes—for the people who need them most."

Stroke-of-the-Pen Gifts

To leave a lasting legacy as simply as possible, consider these planned giving options that allow you to personally change your beneficiary designation form and positively impact children and families for generations to come.

Name Hillside as a beneficiary of your Retirement Plan(s):

By naming the Hillside Foundation as a beneficiary of the balance of your retirement plan assets after your lifetime, you can eliminate the twofold taxation on Individual Retirement Accounts (IRAs) or other qualified retirement plans. This option allows you to make a gift from the most highly taxed assets, leaving more for your family and helping to eliminate future income and estate taxes.

Name Hillside as beneficiary or contribute a Life Insurance policy:

Make a large gift with little cost to yourself by naming the Hillside Foundation as beneficiary of a life insurance policy you no longer need. You'll receive a current income tax deduction, as well as possible future deductions through gifts to pay policy premiums.

The services of a qualified legal counsel or a financial advisor should be sought for specific advice pertaining to your estate plan.



To learn more about the Pinnacle Society,
please contact us today:

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