

*For generations* Sunrise Haven has worked to provide the highest standard of nursing care to our patients and a haven of spiritual renewal to our guests. We are deeply grateful for your active support—for your specific prayers, the time you've volunteered, your thoughtfulness in visiting a loved one, and for your generous financial gifts—all of which are evidence of Love "reflected in love."

Sunrise Haven depends upon your strong and continuous financial support for its day-to-day operations. Each loving gift, in any amount, breathes life into Sunrise Haven and strengthens its service into the future.

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In addition to spontaneous contributions, which are needed and very much appreciated, we also encourage and assist our supporters in the development of planned giving. With careful attention to provisions in both federal and state tax codes, there can be substantial benefits to you, your loved ones, and Sunrise Haven on both a current and a long-term basis. The following planned giving options are described briefly for your consideration.

**Matching Gifts.** If your employer has a Matching Gift program, your gifts might qualify for matching gifts. The value of your gift could be as much as doubled, giving you the satisfaction that you've multiplied your giving. You are encouraged to contact your personnel office to expand the value of your personal gift through this generous corporate benefit.

**Gifts of Stock or Appreciable Assets.** Consider the outright gift of appreciated stocks, mutual funds, bonds, or other marketable assets. Such gifts usually qualify for a charitable income tax deduction equal to the full market value of the securities at the time of transfer.

**Gifts of Real Estate.** You might find it appropriate to make a gift of commercial or residential real estate. You can make the gift now and retain the right to live in the home or income from commercial property for your lifetime. By giving now, you can realize a substantial charitable income tax deduction and the gifted property will be excluded from your estate, thus reducing estate tax liability.

**Gifts of Insurance, IRAs and Other Retirement Accounts.** You can name Sunrise Haven as a beneficiary (total or partial) of a life insurance policy, IRA, 401-K account, or other retirement account.

**Gifts through an Estate.** Making a gift through your estate might be the most realistic way to provide a substantial contribution to Sunrise Haven, while reducing (or even eliminating) federal estate taxes. You can bequeath to Sunrise Haven a specific dollar amount, a specific piece of property, or a stated percentage of the estate, through your will or living trust.

*You should consult your attorney, accountant, or financial advisor in developing a giving plan, especially with regard to tax implications. If you do not have such an advisor, Sunrise Haven can provide the names of friends of the organization who are qualified professionals. Please call Administrator Joan Thompson at the number below.*



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