

PLANNING A LEGACY

A Guide to Giving



Mt. Carmel
VETERANS SERVICE CENTER

VETERANSCENTER.ORG



- Bob McLaughlin

“There is no greater calling than to impact another individual’s life, especially those who have served in our military and veteran communities. Giving any monetary amount shows that we remember, care and want veterans to live a life of dignity!”

Colorado is one of the top five retirement states for those who have served in the armed forces. Having served twenty-nine years in the Army, and retiring out of Ft. Carson Army Post as Garrison Commander, I know the needs of veterans, military, and their families in Colorado.

Since opening the doors in 2016, Mt. Carmel has provided over 100,000 client visits and served over 14,000 individual clients. Please support Mt. Carmel’s mission of empowering lives and strengthening our veteran community.

ESTATE PLANNING GUIDE

Preparing for your passing of a loved one can be extremely difficult. Please visit with your tax attorney or financial advisor before making decisions to ensure your survivors have the information and documents needed to adhere to your wishes.

An Estate Plan provides:

- Financial distribution to loved ones and charitable organizations
- Peace of mind for family, friends, and charities to ensure your estate gets distributed to those you intended
- Peace of mind

You can obtain additional resources by using this QR code to download the VA Survivors and Burial Benefits Kit, VA PAM 27-18-1.



INTEGRATED SERVICES AT MT. CARMEL VETERANS SERVICE CENTER

Mt. Carmel Veterans Service Center provides transition and employment assistance, health and wellness, supportive services, connection to community resources, and safe event space for veterans, military members, and their families. Mt. Carmel was a vision of Mr. Jay Cimino born out of his strong desire to support our veteran community in meaningful ways.

Our **HEALTH AND WELLNESS** services include individual, group & couples therapy, no-cost therapeutic retreats, and non-traditional therapies including trauma-focused yoga, PTSD-focused art and photo therapy, tai-chi and more. Services are confidential and open to veterans of all eras and regardless of discharge status.

The **TRANSITION AND EMPLOYMENT** team directly assists transitioning service members, veterans of all eras, and their family members in gaining meaningful employment, emphasized support for military spouses. The team collaborates with employers, military installations, and community partners to ensure success. The Colorado Governor recently extended state funding five years for the Veterans Service to Career program based on strong success of our pilot program.

Our **MILITARY, VETERAN, AND FAMILY SERVICES** team offers a hand-up to members of the military and veteran community. Working with national, state and community partners, the goal is to help people obtain self-sufficiency and stability.



HEALTH & WELLNESS

- Onsite Counseling Services
- Telehealth Therapy
- Support Groups
- Alternative Therapies
- Retreats



TRANSITION & EMPLOYMENT

- Military Career Transition
- Employment Workshops
- MilSpouse Career Program
- Veteran Job Coaching
- Community Partnership Resources



MILITARY, VETERAN, & FAMILY SERVICES

- Supportive Services and Resources
- Non-Clinical Case Management
- Homeless Veteran Outreach
- Housing and Food Aid
- Financial Coaching
- Educational Programs
- Legal Support



Our nation was founded on service and sacrifice. At Mt. Carmel Veterans Service Center, we believe veterans deserve the utmost respect. When making a gift to Mt. Carmel Veterans Service Center, you will leave a legacy of personal commitment filled with gratitude for those who have served our country.

MT. CARMEL VETERANS SERVICE CENTER STRATEGIC LINES OF EFFORT

WHY WE DO THIS WORK

At Mt. Carmel Veterans Service Center, we believe that military, veterans, and their families have the talent and character to make our community stronger.

When the impact of a veteran's selfless service to our nation requires them to seek support, Mt. Carmel makes it easy for them to access critical resources so that they can achieve success in their lives.

OUR GOAL

To be well-known and respected in the community for delivering timely, relevant, quality programs, and support to our local military, veterans, and their families.

We want to be the veteran's choice for service when a need arises, and we want our partners in this endeavor to feel empowered, appreciated, and effective in the work they do with us at Mt. Carmel Veterans Service Center.

OUR MISSION

To provide best practices for our military, veterans, and their families through accessible programs, integrated services, and collaborative partnerships that empower lives and strengthen our community.

OUR VISION

Mt. Carmel collaborates with the community partners to provide health, wellness, and transition services that nurture mind, body, and spirit.



- Terrance McWilliams

“As a 31-year Veteran of the United States Army, having multiple deployments overseas, moved around the country, and retiring in Colorado, I see a huge need to continue to support our military families. I chose Mt. Carmel Veterans Service Center to give my time, talent and treasure.”

GIFT PLANNING AT MT. CARMEL

Gifting assets to others can be a valuable tool in estate planning, and gifts can help you reduce your taxable estate and avoid the probate process. Your gift to Mt. Carmel will be used to better the lives of thousands of veterans, military members, and their families in Southern Colorado.

You can contribute appreciated property, like stock, bonds, and other securities, and receive a charitable deduction for the total market value of that asset. Along with that, you won't pay any capital gains tax when transferring.

Gift planning doesn't have a dollar amount restriction and does not need to be income-based. Anyone can set up gift planning as part of their estate plan. Gift examples include:

- Cash
- Personal property
- Securities such as stocks, bonds, IRA, and CDs
- Annuities
- Life insurance
- Business
- Trusts
- Collectibles like art, jewelry, and antiques
- Real estate



- Laurie Long

“As a strong financial contributor to Mt. Carmel’s mission for many years, I love knowing that I am helping support the lives of military families in Colorado.”

Legacy giving is more than being remembered beyond death. An enduring legacy is powerful enough to build and strengthen family ties for generations.

WHAT TO CONSIDER WHEN EVALUATING A NONPROFIT

- Ensure their mission aligns with your personal values
Mt. Carmel’s mission is to improve the lives of veterans, military, and their families throughout Colorado.
- Confirm that their financial information is transparent, current, and thorough
Mt. Carmel releases I-990 information annually and shares financial health information in an Annual Report.
- Check for independent evaluations of impact and effectiveness
Mt. Carmel has been evaluated by the National Institute for Social Impact and other organizations. Donations to Mt. Carmel double in impact to the community.
- Consider their reputation in the community
Mt. Carmel is a respected pillar of the community, recognized nationally for our efforts in the veteran community.
- Are the board members respected community stakeholders who take an active role in the organization?
A majority of members serving on Mt. Carmel’s Board of Managers are veterans, in addition to being well-respected leaders in their fields.



ESTATE PLANNING OVERVIEW & CHECKLIST

- Find an experienced estate planner
- Name your executor(s)
- Prepare your will with designated beneficiaries
- Prepare a "living will" that includes a healthcare power of attorney and organ donation wishes
- Prepare funeral instruction and personal letters for loved ones
- Make a list of all your assets and liabilities
- Put a trust in place
- Decide funeral and final internment wishes
- Discuss your estate plan with your family members and inform charities of your bequests
- Keep your insurance policies where they can easily be found, along with social media passwords and personal contact lists
- Review your plan, as necessary, with appropriate notary documentation
- Have at least two sets of signed documents



“Veterans have made great sacrifices for our country. They have not only earned our appreciation, but also our ongoing financial support. It’s the least we can do to show our gratitude for all they have given us.”



- Randy Gradishar

*“To care for him who shall have borne
the battle and for his widow, and his orphan.”
– Abraham Lincoln*

**FOR MORE INFORMATION OR TO MAKE A DONATION, PLEASE CONTACT:
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