



**BOYS & GIRLS CLUBS**  
OF THE MIDLANDS



# GIFT PLANNING GUIDE



**“For over 60 years, our family has seen the impact made by Boys & Girls Clubs in our community - an organization that truly saves and transforms lives. We reminisce on how far the Clubs have come but we also continue to look to the future.”**

**-Karen and Kim Hawkins**

# YOUR LEGACY THEIR FUTURE



**Your Legacy. Their Future.** Boys & Girls Clubs of the Midlands largest endowment fundraising campaign - ever. This historic legacy giving campaign is designed to ensure that the Clubs can continue to fulfill the promises we've kept for more than six decades and carry them forward for generations to come.

By investing in the Clubs, you're helping to secure the long-term future of a mission that changes lives every day. Your legacy becomes the launchpad for young people to reach their full potential as productive, responsible and caring members of society.

The Club's legacy giving team will support you as you explore ways to provide thoughtful, lasting gifts. Leaving a legacy gift will carry your impact forward. With your support, we'll continue providing a place where children find more than just a program—they find a place to belong.

## OUR MISSION

Boys & Girls Clubs of the Midlands' mission is to inspire and enable all young people, especially those who need us most, to realize their full potential as productive, responsible, healthy and caring members of society.

At Boys & Girls Clubs of the Midlands, we understand that a safe and welcoming environment is critical to a child's development. Since 1962, we have been committed to providing guidance and resources to children and families to foster growth and success.

By including Boys & Girls Clubs of the Midlands in your legacy plans, you help sustain the critical out-of-school programs that young people and families count on every day.



**" We know from personal experience that Boys & Girls Clubs of the Midlands are uniquely equipped to assist youth achieve their greatest potential and thereby strengthen our communities. Supporting the continuation of this into the future strongly aligns with our values. Legacy giving is for everyone! It is an opportunity to make a huge impact for generations that costs nothing today. It's one of the best ways to shape and influence how you will be remembered."**

**-Jonna and Tim Holland**

# LEGACY TAKING FLIGHT

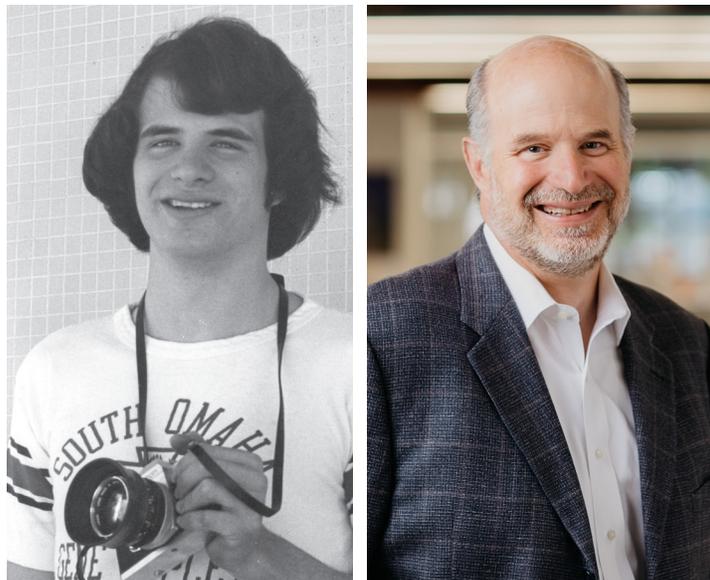
## THE TIM HOLLAND STORY

Boys & Girls Clubs across the country have meant many things to many people. For Tim Holland, current Board Chair, the Boys & Girls Club in his South Omaha neighborhood helped him discover a dream and provided the tools to achieve it.

Tim's father enrolled him at the South Omaha Club when he was nine. The Club offered a safe, affordable place after school for him and his siblings. "We would walk a mile to and from the Club. At the time you had to pay extra for dinner. It went from a dime to a quarter while I was there," Tim recalls.

Club Arts Director, Dwight Day, noticed Tim's artistic talent. "I was encouraged to take drafting classes in junior high, and then in high school I took architectural drafting classes," Tim said. "At the time, I didn't have plans to get a bachelor's degree. No family members had gone to college."

In 1977, Mr. Day surprised Tim with an interview with the Dean of Architecture at UNL. A meeting that changed the trajectory of Tim's life.



When Tim couldn't afford his second year, Mr. Day introduced him to Leo A. Daly, Jr., a Founding Board Member of the Clubs. After interning that summer, Daly told him, "We really like what you're doing and we want to help pay for your undergraduate tuition." The scholarship covered tuition and books, while the internship covered room and board.

As graduation neared, Daly encouraged Tim to pursue a master's degree, promising to fund half and loan the rest. **"I was a kid from South Omaha who had no plan to go to college and now I was applying to programs like Berkley and Harvard,"** Tim said. He was accepted into Harvard.

Now a Founding Principal with Holland Basham Architects, Tim continues to give back. "Looking back and knowing my experience, I really appreciate what the Clubs are doing with the scholarship program today. We're not just handing out the money to kids, but we're really following them all the way through. It's important to understand that it's more than just getting them to college. We're getting them through college, too."



# YOUR LEGACY

Every child has dreams but not every child has the opportunity to pursue them. With a legacy gift to Boys & Girls Clubs of the Midlands, you create more than a legacy, you create future opportunities for thousands of kids in the Omaha metro who need the valuable resources that the Boys & Girls Clubs of the Midlands provide each day.

Your foresight today helps ensure that generations of young people, especially those who need us most, have the support, mentorship and safe spaces they need to thrive. Whether your passion is academic success, character and leadership development, health and wellness, your legacy fuels every step of a child's journey to becoming a productive, caring and responsible adult.

Planning a legacy gift is an important decision. No matter the amount, legacy gifts will have a positive impact on the Boys & Girls Clubs of the Midlands. You may choose to make a gift now and extend its impact later through a legacy gift, or you may choose to defer your gift until a later time. There is no one way to support the Boys & Girls Clubs of the Midlands.

With your legacy gift:

- You extend your values beyond your lifetime.
- You help bridge the opportunity gap for underserved youth.
- You ensure the Clubs continue to be a beacon of hope, support, and growth for decades to come.

Let your legacy take flight and help their futures take off.

**“Our family has a long history with Boys & Girls Clubs—Cathy as a Club member and Todd as a volunteer for more than 30 years. Over that time, we have seen countless examples of the positive impact the Clubs have on the youth they serve. It is vital to both these kids and our community that the Clubs continue to thrive long into the future. A legacy gift is one way we can help ensure great futures for the young people who need the Clubs the most.”**

**-Cathy and Todd Engle**

# THEIR FUTURE



At Boys & Girls Clubs, the relationships formed between members and staff don't just shape childhoods - they shape lives. For many, the Clubs are more than a safe space after school. They're a family, a foundation and a lifelong source of inspiration.

No one knows this better than Tony Gonzalez, Club Director and proud alum. Tony's story begins where he still spends his days, inside the same Club he now leads. "I started coming to the Club when I was six years old," he recalls. "By 17, I had my first job here checking kids in at the front desk. Now, I've worked here for 24 years but really, I've never left. It's been part of my life for 36 years. It's my lifelong calling."

From a curious six-year-old to a leader shaping the next generation, Tony credits the Club with teaching him belief in himself. "The Club taught me that whatever I want to achieve, I can do it," he says. "Now, I want to be that same positive role model for the kids who walk through our doors."

One of the greatest joys of Tony's job is seeing former members return as adults and enrolling their own kids. One such family is the Russells, whose story mirrors Tony's. Brothers Aaron and Calvin Russell first came to the Club young, full of energy and searching for guidance. "We didn't grow up in the best neighborhood," they share. "But the Club gave us a solid foundation. It kept us out of trouble, showed us what success could look like and gave us people who cared. Without it, our lives could have gone in a very different direction."

Their mother, Mary, agrees. "Thank goodness the Clubs were there," she says. "I was raising my boys on my own. The Club helped me raise them. When I dropped them off each day, I knew they were safe and supported."

For Tony, the Russell's, and countless others, Boys & Girls Club isn't just a place-it's a lifeline. It's where potential is discovered, confidence is built, and futures are changed. Because once you're part of the Club, you're part of a family that lasts a lifetime.



*Calvin Russell, Tony Gonzalez & Aaron Russell*

# LEGACY GIVING OPTIONS



## **Make a Gift Through Your Will or Trust**

A Charitable bequest is the easiest, most popular and flexible way to support our cause. With the help of an advisor, you can include language in your will or trust designating Boys & Girls Clubs of the Midlands as beneficiary.

- You can gift a percentage of your estate
- You can gift a specific dollar amount or asset
- You can gift from the balance or residue of your estate
- You can make a beneficiary designation of certain assets

A bequest can also be an effective way to lessen the burden of taxes on your family and estate. Whether you wish to designate your gift for a specific purpose, or you are giving unrestricted support, the Boys & Girls Clubs of the Midlands development team will work with you to make sure your intentions are honored.

## **Make a Gift Through Retirement Plan Assets**

Naming Boys & Girls Clubs of the Midlands as a beneficiary is the first step to using your tax-deferred retirement account to impact the Clubs. These assets often are the most tax-wise to contribute because they are subject first to estate taxes and then to income taxes as they are paid out to non-charitable beneficiaries. Ask the administrator of your plan to give you a change of beneficiary form and indicate the amount or percentage of assets you wish to direct to the Clubs. This includes, but not limited to, IRA Charitable Rollover, 401(k), Keogh and 403 (b).

## **Make a Gift Through Real Estate**

You can contribute your residence, vacation home or farm while retaining the right to occupy or use the property for your lifetime and receiving a current charitable income tax deduction. Boys & Girls Clubs of the Midlands will receive full ownership of your property when your lifetime interest ends; or you may terminate your interest voluntarily. The proceeds from the sale of your property will benefit the Clubs as you specify.

## **Make a Gift Through Donor Advised Funds**

Designate Boys & Girls Clubs of the Midlands as beneficiary to receive the balance of your Donor Advised Fund to ensure your values and commitment continue.

## Make a Gift Through Charitable Gift Annuities

A charitable gift annuity is a great way you can make a gift to the Clubs and personally benefit. You transfer your cash or property to our organization and we promise to make fixed payments to you for life at a rate based on your age.

Charitable Gift Annuity Solutions is Boys & Girls Clubs of the Midlands preferred and only planned giving partner for Charitable Gift Annuities.

## Make a Gift Through Life Insurance

You can contribute life insurance by having Boys & Girls Clubs of the Midlands as a beneficiary through a Beneficiary Designation Form with your insurance company and naming Boys & Girls Clubs of the Midlands as the new owner. This change in ownership may provide you with an immediate charitable income tax deduction, and you also may be able to deduct future insurance premium payments.

# SAMPLE LANGUAGE

## Specific Amount

I give \$\_\_\_\_\_ to Boys & Girls Clubs of the Midlands (2610 Hamilton Street, Omaha, NE), Tax ID 47-0467350. Designated for the inclusion in Boys & Girls Clubs of the Midlands' Fred Schott Legacy Society Endowment.

## Percentage of your Estate

I give \_\_\_\_\_% of the balance in my account as of the date of my death to Boys & Girls Clubs of the Midlands, (2610 Hamilton Street, Omaha, NE), Tax ID (EIN): 47-0467350, designated for inclusion in Boys & Girls Clubs of the Midlands' Fred Schott Legacy Society Endowment.

## Residue of your Estate

I give and bequeath to Boys & Girls Clubs of the Midlands, Omaha, NE (Tax ID 47-0467350), the rest, residue and remainder of my estate to be used for its general purposes.

## Contingent Bequest

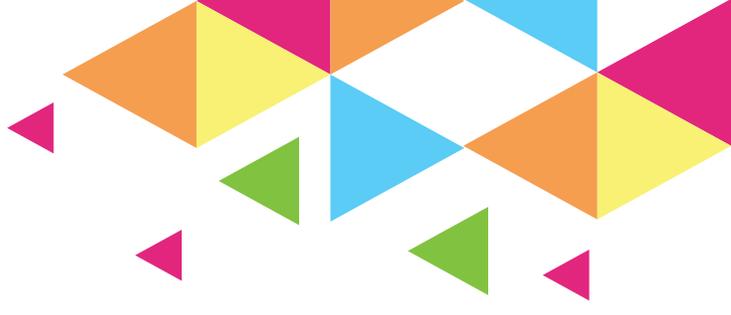
In the event that any of the above named beneficiaries shall not survive me, or shall die during the administration of my estate, within ninety (90) days from the date of my death, or as a result of a common disaster, then I give and bequeath that beneficiary's share of my estate to Boys & Girls Clubs of the Midlands, Omaha, NE (Tax ID 47-0467350) to be used for its general purposes.



GIRLS CLUJS  
E MIDLANDS



WEEKLY  
What's New?



# FRED SCHOTT LEGACY SOCIETY

The Fred Schott Legacy Society honors a lifetime of service and belief in the power of Boys & Girls Clubs to change lives. Fred Schott served as President & CEO of Boys & Girls Clubs of the Midlands from 2002 to 2012 but his connection to the Clubs spans more than 55 years. His journey began in 1958 as a young member of the Portland Avenue Boys Club in Louisville, Kentucky, an experience that shaped his future and ignited a lifelong commitment to serving youth.

In 1972, Fred and his wife, Donna, moved to Carter Lake, Iowa, where he began his professional career with Boys & Girls Clubs of the Midlands. Under his visionary leadership, the organization launched its first school-based Clubs, dramatically expanding access and ultimately doubling the number of members served each year. His legacy reflects not only professional achievement but a deep gratitude for the mentors, role models and opportunities that shaped his life.

The Fred Schott Legacy Society celebrates this enduring impact and honors those who, like Fred, believe in investing today to create brighter futures for generations to come. With the future in mind, Fred shared, *“With the wonderful leadership of Boys & Girls Clubs of the Midlands and Boys & Girls Clubs of America, I expect great things that I can’t even imagine yet.”*

## Joining the Fred Schott Legacy Society:

- Members continue to help Club kids long into the future.
- Membership is available to any donor who makes a legacy gift.
- Members are invited to annual events.
- Members are recognized in Boys & Girls Clubs of the Midlands publications such as annual report, website, etc. (Details of gifts are strictly confidential)

## CONTACT

Boys & Girls Clubs of the Midlands staff are here to work with you and create a giving plan that is meaningful to you and your family. Please contact Beth Bergman (VP of the Leadership Giving) or Tim and Jonna Holland (Board Champions).

[bbergman@bgcomaha.org](mailto:bbergman@bgcomaha.org) or [tholland@hollandbasham.com](mailto:tholland@hollandbasham.com)



**BOYS & GIRLS CLUBS**  
OF THE MIDLANDS

2610 HAMILTON ST | OMAHA, NE 68131 | [BGCOMAHA.ORG](http://BGCOMAHA.ORG) | 402.342.1600