



A community leader in end-of-life care

I would like more information about
planned gifts to Omega House.
Please contact me.

Name _____

Address _____

City _____

State _____ ZIP _____

Phone _____

Email _____

This information is for general
purposes. Individuals are advised to
consult legal and tax counsel.
All information is confidential.

Send in enclosed envelope to:

Omega House
2211 Maureen Lane
Houghton, MI 49931
Phone: 906-482-4438
www.Omega-House.org



Our Mission

To provide a home-like environment
where people at the end of life may live
fully, receiving compassionate and
competent care from professional,
volunteer and family caregivers.



*We make a living by what
we get, but we make a life by
what we give.
- Winston Churchill*



Planned Giving Program

*How to support Omega House
through a will or estate
planned gift.*

Omega House Planned Giving Program

You can leave a legacy of compassion by including Omega House in your will or estate plan. By including Omega House in your estate plans, you make a lasting contribution that supports our mission and will touch countless lives. A planned gift to Omega House may provide tax advantages for you and your heirs. Your planned gift to Omega House can be recognized, or you may remain anonymous.



Valeda Tomasi believed in the mission of Omega House. She is pictured here at age 105 with her niece, Charlisie Antikainen.

With a planned gift to Omega House, you can:

- Make a larger charitable gift than you thought possible during your lifetime
- Take care of the financial needs of your family first
- Provide inheritances for your heirs at a lower tax cost
- Reduce your income tax and even avoid capital gains taxes
- Diversify your investment portfolio
- Increase income and effective rate of return
- Leave a gift without giving up assets

Bequest

Bequests are among the most popular and easiest ways to make a planned gift. By designating Omega House as a beneficiary, you create a lasting legacy for the future without diminishing your current assets. A bequest remains revocable until your passing.

In your Will, you may:

- Designate a specific amount of money or portion of your estate to support Omega House
- Designate publicly traded securities – shares, bonds, mutual funds – as your gift.

Charitable Remainder Trust

In a Charitable Remainder Trust, a donor establishes a trust and makes an irrevocable gift of the remaining interest to Omega House. The gift becomes effective on your passing, but during your lifetime, you will continue to receive the income earned by the capital.

Charitable Lead Trust

This estate planning tool enables you to transfer assets to a trust that would pay its income to Omega House for a set period of time. At the end of the term, the principal and all capital appreciation returns to you or others whom you name.

For more information about gifts to Omega House, contact us at 906-482-4438 or visit our website www.omega-house.org.

Life Insurance/Retirement Assets

A gift of life insurance is an economical way to make a significant gift. The modest premium payments to the policy may be tax deductible today, and when the life insurance policy comes into effect, your generosity will translate into a substantial gift to Omega House.

Retirement funds held in IRAs, 401(K)s, or other qualified retirement plans offer a straightforward and tax-efficient way to make a generous gift to Omega House. If you have reached the age where you are eligible or required to take distributions from these accounts, and the funds exceed your current income needs, a gift can help to offset your tax liability, while providing support to Omega House.



This is a guide to use in making planned giving decisions. We encourage you to consult your tax advisor, attorney or financial planner to ensure you provide for your loved ones before funds are allocated to a charitable cause. Options listed here give you flexibility, control and the enjoyment of your assets during your lifetime.