



# LEGACY GIVING

Thank you for considering a Legacy Gift to Mobility Worldwide! Discover what Legacy Giving entails, how to make a Legacy Gift, and explore who your contribution can support within Mobility Worldwide.



## QUICKSTART GUIDE TO LEGACY GIVING

<b>WHAT IS LEGACY GIVING?</b>	<p>A legacy gift is a donation made by an individual through their will or trust, or another formal non-probate planning designation or transfer.</p>
<b>WHAT QUALIFY AS A LEGACY GIFT?</b>	<p>Planned gifts can bring various tax benefits for the donor or a donor's heirs. Such a legacy gift can be made upon a donor's death, or while they are alive. They can be monetary, or material goods, property, investments – even automobiles.</p> <p>They can be invaluable to a non-profit organization – ensuring a sustained, steady and dependable source of income for future programming and initiatives.</p>
<b>HOW DO I GIVE A LEGACY GIFT?</b>	<p>Legacy gifts are typically prepared by a financial planner and reflect the values and desires of the donor.</p> <p>If you are interested in talking with our legal and investment team about a legacy gift, please contact: Robert L. Fleming, General Counsel, Mobility Worldwide, and Treasurer, PET® Mobility Project Foundation, Inc. care of <a href="mailto:robflaming1@juno.com">robflaming1@juno.com</a>; or cellphone: 573-864-2154.</p>



## WHO WOULD YOU LIKE TO SUPPORT?

### INDIVIDUAL AFFILIATE SHOPS

Nineteen throughout the U.S. and five across Sub-Saharan Africa

*The individual affiliate shops, in Columbia, Penney Farms, and two dozen other locations across the United States and overseas. These affiliate shops maintain a physical plant, build mobility carts, collect other mobility devices, and deliver them to warehousing and distribution efforts by distribution partners. Donations at this level support the shop operation, cart materials purchases, construction, boxing for shipping, and local volunteer work in the shop of your choice. A check to "Mobility Worldwide – Missouri –Columbia" for example, is used by the identified local shop for these purposes.*

### MOBILITY WORLDWIDE

Umbrella organization and support system for network of affiliates

*Mobility Worldwide, formerly known as PET® International, Inc., is the umbrella organization created by the affiliates in 2004 to oversee warehousing and distribution logistics, work with distribution partners, develop standardization protocols, medical/safety compliance and acceptability, seek economies in purchasing of bulk materials, and to develop overseas shops/relationships, etc. Mobility Worldwide holds our trademarks on that name, on PET®, and our logo (above), and takes steps to protect our brand name, our federal tax exemption (IRS 501(c)(3)), and our international partnerships with distribution entities and governments. A check to "Mobility Worldwide" is used to further these purposes and initiatives.*

### PET® MOBILITY PROJECT FOUNDATION, INC

Legal and investment team to steward major gifts

*The PET® Mobility Project Foundation, Inc. was created by Mobility Worldwide in 2016 to develop a legal and investment team, to solicit major corporate donations and legacy gifts to help underwrite the programming and development initiatives of Mobility Worldwide and its affiliates going into the future. Development of the Mobility Sierra Leone shop, and on-going similar efforts in Liberia and Kenya are examples of the Foundation's work, hand in hand with Mobility Worldwide, to further these initiatives. In addition, through the Foundation's legal team and relationship with our investment advisor institution, Simmons Bank, of Columbia, Missouri, we can provide a donor and their financial and legal advisors with various options in planning legacy gifts. (See Reverse).*



## HOW DO YOU WANT TO MAKE DONATIONS TO MOBILITY?

Historically, like most start up, grassroots not-for-profits, “The PET® Project” relied on founder Mel West’s ability to tell the Personal Energy Transportation story to church groups, service clubs, and community supporters, and to “take up a collection”. As he did so, he recruited volunteers to help, and they became the first cadre of committed supporters, speakers, and donors to spread the word. Collections at such gatherings morphed into fundraising campaigns, special events, and mailings to an ever growing donor list. Those efforts all continue at both the affiliate and Mobility Worldwide umbrella level. In addition, grant solicitations began to local and national corporate sponsors, who saw that we were doing a good thing, and wanted to help. They have done so with cash donations, discounted prices on materials, and corporate sponsorships.

In 2016, the Foundation was created by the Mobility Worldwide Board of Trustees, tasked with the job of creating a legal and investment team that could educate an ever increasing group of donors about Mobility’s vision: “to eradicate immobility in the world”, and to enlist their help with our initiatives and plans for the future to realize that vision. What this entails is expanding our donor base, and educating those donors about how they can be a part of realizing the vision, and eradicating immobility. It all starts with giving those with no hope, and no avenue to mobility, the assistance they need to change their lives.

We will accomplish this with efforts to make every person who hears our message a donor; at whatever level or form they are comfortable with, but all joining hands in a common effort.

*Legacy gifts*, as explained on the reverse side, and further broken down by types below, are another critical part of the funding revenue stream of a sustainable, reliable and predictable program. Donors with a heart for the vision of eradicating immobility have the freedom to choose how their gift is used, have the ability to be more engaged in the effort, and can receive assistance in their tax and estate planning. Our legal and investment team will work with the donor’s financial and legal advisors to develop a plan that provides benefits to the donor, as well as Mobility and its assisted device recipients.



## EXAMPLES OF LEGACY GIFTS:

<b>A TESTAMENTARY LAST WILL, OR A LIVING TRUST</b>	<p><b><i>A testamentary last will, or a living trust</i></b>, are legal documents that a donor can create with the assistance of their own attorney and financial advisor, to make a legacy gift to Mobility at whatever level of the organization the donor wishes to support (see reverse). Our legal and investment team identified below can assist in developing and creating these documents to further this intention.</p> <p>Such a bequest is one of the easiest and most tangible ways to have a lasting impact on the people and organizations that mean the most to you, like Mobility Worldwide. You can create a bequest of any dollar amount, gift specific property or designate a percentage of your estate in your will or trust. Consider including a tithe in your will or trust to benefit Mobility Worldwide, for the purposes of, and at whatever level of the organization you wish. The following text as an example may be helpful to you and your legal counsel (who you should consult) when drawing up your will or trust:</p> <p><i>"I give and bequeath to Mobility Worldwide, (tax ID #86-1128278), located at 503 E. Nifong Blvd., Ste. H #186, Columbia, MO 65201, (or to a local Mobility Worldwide affiliate, or to the PET Mobility Project Foundation, Inc. (PMPF), at addresses available on the website) the sum of \$_____ (or % of asset) to be used for general support to advance its mission."</i></p>
<b>GIFTS OF INSURANCE PROCEEDS</b>	<p><b><i>Gifts of Insurance proceeds</i></b> - If you like, you may name Mobility Worldwide, an affiliate shop, or the Foundation, as the beneficiary (either primary or contingent) of a life insurance policy. You could also transfer ownership of a policy with cash value that you no longer need because your circumstances have changed. Here too, you may receive a tax deduction depending on your personal circumstances.</p>
<b>NON-PROBATE TRANSFERS</b>	<p><b><i>Non-probate transfers</i></b>, including making Mobility a beneficiary, either primary or contingent, on investments with third party institutions is another way that donors can make a current or future gift.</p>
<b>STOCK TRANSFERS</b>	<p><b><i>Stock transfers</i></b> are another way our donors can give to Mobility. We have had donors give stock as a an unrestricted charitable donation, with favorable tax consequences to the donor; others have contributed the stock for specific purposes or initiatives, with the income therefrom dedicated to a program while the stock itself is held in restriction for future use or release.</p>
<b>QUALIFIED CHARITABLE DISTRIBUTIONS FROM A DONOR'S TRADITIONAL IRA</b>	<p><b><i>Qualified charitable distributions from a donor's traditional IRA</i></b> is a method which is given favored treatment by the Internal Revenue Service. Traditional IRA owners age 73 years or over have the ability to transfer up to a total of \$100,000 (also limited to 60% of the taxpayers' AGI on their tax return) of what would otherwise be taxable income directly to qualified charitable entities each year (known as QCD's). Married taxpayers who both have a traditional IRA and qualify can donate up to \$200,000 from their household (with similar percentage of AGI limitations). Moreover, QCD's by those who are at least 73 count towards the IRA owner's required minimum distribution (RMD) each year.</p>