

THE DOROTHEA DIX SOCIETY



Mental illness is **REAL**.
Recovery is **POSSIBLE**.

What is the Dorothea Dix Society?

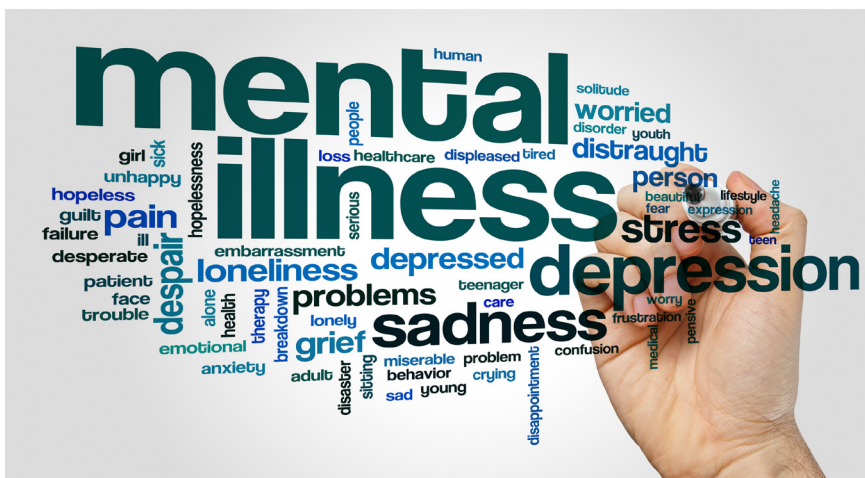
The Dorothea Dix Society of the Mental Health Association of Essex and Morris County, Inc. (MHAEM) was established to recognize the generosity of donors who have included MHAEM in their estate planning. Dorothea Dix Society members have created a lasting legacy that will support essential programs providing mental health services to our communities. It is named in honor of mental health and social justice pioneer Dorothea Dix, who championed the establishment of the first mental health institution in New Jersey and advocated for the humane and compassionate treatment of individuals suffering from mental illness.

Why MHAEM?

The Mental Health Association of Essex and Morris, Inc. is a recognized leader in mental health systems change throughout northern New Jersey. Our mission is to promote mental health, including the integration of physical healthcare, to improve the care and treatment of individuals with mental illness, and to remove the stigma associated with emotional and mental disorders.

We have an extensive, proven history of changing lives through:

- **Advocating** for treatment of people living with severe and persistent mental illness
- **Providing** the highest quality direct services to those in need
- **Educating** the public in mental health awareness and wellness
- **Helping** every individual we serve in every way we can realize their goals when it comes to wellness and recovery



Designate your gift

Gifts may be designated to many of our vital programs, including:

Area of Greatest Need – these gifts are vital as they enable support to go directly to the area of greatest and most immediate need.

Children, Individuals and Families – support will assist us in providing high quality, affordable, comprehensive, accessible, and culturally appropriate mental health service for children, support services for families and other caregivers; and therapeutic services to individuals who do not have access to private treatment.

Building a Better Future Fund – support will assist us as we develop plans for purchase and/or renovation of permanent infrastructures to ensure our presence as a valuable behavioral health service provider in Essex and Morris Counties.



The Dorothea Dix Society was named to recognize the agency's upcoming 70th anniversary as well as define the agency and its programs as strong and valuable. Dorothea Dix Society members will be recognized in our publications and website, receive email communications on current issues and programs, and invited to our annual Dorothea Dix Society State of the Agency gathering.

Options for a planned gift:

Bequest

A charitable bequest can be a meaningful way to make a gift to MHAEM. When you choose to include us in your will or living trust, you can indicate your wishes in a few ways:

- A **specific amount** of money (e.g. \$5,000, \$10,000) or designate a specific asset
- A **percentage of all the assets** included in your estate after taking care of family
- A **portion** of the residual amount that is left in the estate

Making a charitable bequest means that that your gift doesn't come to us until after your lifetime, so you have complete control over your assets. With proper planning, you will also be able to save on estate taxes.

Retirement Assets

Name us the primary beneficiary of your retirement account after your lifetime and avoid the twofold taxation on IRAs or other retirement plans. This allows you to make the gift from the most highly taxed assets, leaving better assets for family.

Insurance Designation

There are two ways to designate your life insurance policy to us:

- Designating us as the **primary beneficiary** of your life insurance policy means you can make a large gift with little cost to yourself. By doing so, you will be eligible for a current income tax deduction and possible future deductions through gifts to pay future premiums.
- Naming us as **owner** of the policy means you will receive an income tax deduction for the policy's fair market value or cost basis, if lower, on the date of the gift. Also, you will receive future income tax deductions when you name us as owner and continue to pay premiums.



Sample bequest language

Create your own legacy by making a bequest gift to the Mental Health Association of Essex and Morris County, Inc. in your will. A bequest to us can be made by creating a new will, adding a codicil to your present will, or including us as a beneficiary of your life insurance policy or qualified retirement account.

Below is an example of bequest language that you may use if you wish to make a gift through your will or living trust:

I give, devise, and bequeath to the Mental Health Association of Essex and Morris, Inc. the sum of _____ dollars/ _____ percentage of my estate, to be used _____ (choose either for general purposes, area of greatest need or for a specific program.)

Please consult with the Mental Health Association of Essex and Morris County, Inc. staff in advance for specific program designation.

Steps to a planned legacy gift

1. Contact the Mental Health Association of Essex and Morris, Inc.'s Development Office at 973.509.9777 for more information about your options.
2. Contact your attorney and/or your financial advisor. Let them know you are considering a planned gift to the Mental Health Association of Essex and Morris, Inc. They can assist you in determining what type of gift best suits your personal and financial circumstances.
3. Talk to your family and friends about your plans and wishes in addressing family needs as well as your legacy gifts.

