



DIMITRI HOUSE

Dimitri House, Inc.  
102 North Union Street  
Rochester, NY 14607  
585.325.1796  
[www.dimitri-house.org](http://www.dimitri-house.org)

## Leave A Legacy

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Join the Shepherds Circle and become a partner in sustaining Dimitri House's mission of serving those in need in the Rochester community through planned giving



## The Dimitri House Mission

We serve our neighbors in need with love and acceptance, joining them on their journey toward self-sufficiency

Dimitri House is named after Dimitri Mamczur, a homeless man who lived in two taped-together cardboard boxes under an expressway bridge on I-590 in Rochester, New York.

On a cold, rainy night while heading back to his humble shelter, Dimitri was hit by a car. For two weeks Father James Callan, then pastor of Corpus Christi Church, spent time with him. He anointed him and offered him gentle, encouraging words of hope. Dimitri died two weeks later.

Over 150 people came to Dimitri's funeral to say goodbye and celebrate his life. People who knew him shared stories about how he would help local merchants but decline money when offered; how he would give his last cigarette to a homeless friend; and how he would collect bottles and cans to buy bread to feed the birds.

Many were touched by Dimitri's story and made a commitment to do more for the homeless and poor of Rochester. From there, our property was purchased and named Dimitri House.

Today, we continue to honor Dimitri by serving our neighbors in need with love and acceptance, joining them on their journey toward self-sufficiency.



“When asked, ‘Am I my brother’s keeper?’ Dimitri House responds with an emphatic, ‘Yes!’ It is that love and kindness that evokes my respect and support.”

-Paul B., Rochester





## The Shepherds Circle

### Become a dedicated supporter of Dimitri House and leave a legacy

We invite you to join us as a partner in our mission by becoming a member of the Shepherds Circle. Members are dedicated supporters of Dimitri House. They are committed to leaving a legacy of support for our mission by including Dimitri House in their estate plans or making a planned gift. Our partners in the Shepherds Circle stand loyally with us in continuing our work of serving our neighbors in need in the Rochester community. Their legacies will extend far beyond their lifetimes, ensuring that our mission extends into the future.

Planned giving creates a tangible personal statement. It also ensures the organization's future while enhancing your financial plans and security. With careful planning, it is possible to reduce or eliminate income and estate taxes while turning appreciated assets into income for yourself or others.

Through a planned gift, you may:

- Increase current income for yourself or your designated beneficiary
- Reduce income tax liability
- Avoid capital gains tax
- Pass assets on to your family and pay less tax

“The test of our progress is not whether we add more to the abundance of those who have much; it is whether we provide enough for those who have too little.”

-Franklin D. Roosevelt





## Gifts by Will or Revocable Trust

When you decide to include Dimitri House in your will, you make the ultimate gift. Your legacy will help Dimitri House carry its important mission into the future. A gift by will or bequest is totally deductible for your estate tax purposes. Once you notify Dimitri House of your bequest intention, you join the Shepherds Circle.



Here are different ways to give support through a charitable bequest, along with some commonly used language:

**A residual bequest grants the residue, or portion of the residue, of your estate to the organization after specific bequests have been made**

"I give to Dimitri House, Inc., a non-profit organization located in Rochester, New York, all (or \_\_\_%) of the rest, residue and remainder of my estate, both real and personal property of whatever kind and wheresoever situated to be used for general purposes."

**A specific bequest of a stated dollar amount or specific securities**

"I give to Dimitri House, Inc., a non-profit organization located in Rochester, New York, the sum of \_\_\_ dollars (or describe the specific property or security you intend to give) to be used for general purposes."

**A contingent bequest in case one or more of your bequests cannot be fulfilled**

"If any of the above named beneficiaries should predecease me, I hereby give his/her share of my estate to Dimitri House Inc., a non-profit organization located in Rochester, New York."

**A life income bequest which gives income to someone close to you with the principal reverting to Dimitri House after his/her lifetime**

Contact Dimitri House to determine wording that will ensure its utilization according to your intentions.

**Always consult your attorney when drawing up or revising your will to ensure your intentions are carried out properly.**

The name and address to include in your will is:

Dimitri House, Inc.  
102 North Union Street  
Rochester, NY 14607

Revocable living trusts, popular estate planning documents that resemble wills, contain instructions for managing your personal assets during your life and distributing your assets after your death. Setting up a living trust is more difficult than a will, but there are some advantages. Perhaps most significantly, a living trust allows you to designate a trustee to manage your assets in the event you become disabled or incapacitated.



## Charitable Gift Annuity

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A charitable gift annuity is a simple contract between you and Dimitri House that allows you to donate cash or securities and receive fixed annual payments for life. You will also be eligible for a federal income tax deduction in the year you make your gift if you itemize deductions in your returns.

The minimum donation to establish a charitable gift annuity with Dimitri House is \$5,000. The amount of your annual payment is based on your date of birth and the amount you give to create the gift annuity.

You must be age 60 or older to establish an annuity with Dimitri House if payments are to begin right away. If you are 55 or older, you can benefit through a deferred charitable gift annuity by postponing your payments for a year or more, perhaps until your planned retirement age.



## Gifts of Life Insurance

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Life insurance can be a convenient way to make a substantial gift to Dimitri House for a relatively modest annual cost. You can use a paid up policy you no longer need or purchase a new policy to make your gift. Below are examples of charitable gift-giving opportunities using life insurance.

- Dimitri House as Beneficiary**  
You can name Dimitri House as the beneficiary of a life insurance policy while retaining ownership of the policy and access to the cash value. However, because you retain ownership and can change the beneficiary, no income tax charitable deduction is allowed for the value of the policy.
- Survivorship Life Insurance**  
Also known as “second to die insurance,” the lives of two people are covered under this form of insurance. When the second insured dies, the policy’s benefits can be payable directly to Dimitri House. This form of life insurance is less expensive than others, enabling you to make a larger charitable gift than you might otherwise consider.
- Dimitri House as Owner**  
If you assign a paid up insurance policy to Dimitri House as its owner, you can claim a federal income tax charitable deduction for the policy’s fair market value of the net premiums paid, whichever is less. If the policy is not paid in full, your subsequent premium payments on behalf of Dimitri House are also deductible. Or you can make annual contributions to directly to Dimitri House that enables us to pay subsequent premiums.



## Charitable Remainder Trusts

A charitable remainder trust provides substantial financial and tax benefits for the donor as well as significant gifts to Dimitri House.

When you establish a charitable remainder trust, you irrevocably donate cash or property to fund the trust. You name a trustee (who can be yourself) to manage assets and earnings, and money from the investments is used to provide regular annual income to you or as many beneficiaries as you designate.

Payments from the trust are either made for the life of the beneficiary or for a specific period of time not exceeding 20 years. At the end of the term, or upon the beneficiary's death, trust assets pass to Dimitri House and any other charities designated in the trust.

You will need an attorney to draw up your trust, and you will need to select a trustee to manage it. You can serve as your own trustee or you can hire a bank, trust company, or other financial institution.

Since a charitable remainder trust requires separate management and often separate investment, it is usually not economical unless the principal initially equals or exceeds \$100,000.

### Potential benefits you may receive from a charitable remainder trust:

- Increased current income from appreciated assets
- A generous income tax charitable deduction for the value of Dimitri House's remainder interest, i.e. the present value of Dimitri House's right to receive the trust assets when the trust ends. The present value is determined for a set date when future payments or a series of future payments are estimated to be made. That value is also discounted to reflect the change in money's value over time and other factors such as an investment risk
- The elimination of capital gains tax on any appreciated property used to fund the trust
- Savings in estate taxes and probate costs, since the value of Dimitri House's remainder interest is removed from your estate
- Generous support to Dimitri House or multiple charities in a single trust

A charitable remainder trust can provide either fixed or variable income to its beneficiaries.

- For fixed income, a charitable remainder annuity trust (CRAT) pays a fixed percentage of the trust's initial fair market value so that it provides reliable, unchanging income. Market fluctuations will have no effect on payments. An annual payout amount (no less than 5%) is set when the trust is created and continues for the life of the trust. No additional contributions can be made to a charitable remainder annuity trust.
- For variable income, a charitable remainder untrust (CRUT) is established. The fair market value of the trust is revalued annually and payments fluctuate as the value of the assets fluctuates. When the trust is created, you decide what percentage (no less than 5%) of the fair market value you wish to receive as income.





## Still Have Questions?

If you have questions or need additional information about any of these options for giving, please consult with your attorney. If you should decide to join our program of Planned Giving, we ask that you notify us so that we may include you as a member of our **Shepherds Circle**. We don't need to know the amount, only that you have included Dimitri House as a beneficiary in your will or other estate planning. If you wish, your gift may be listed as anonymous.

### Send your notification by mail, email, or phone:

Dimitri House, Inc.  
c/o Robert Wood, Treasurer  
102 North Union Street  
Rochester, NY 14607

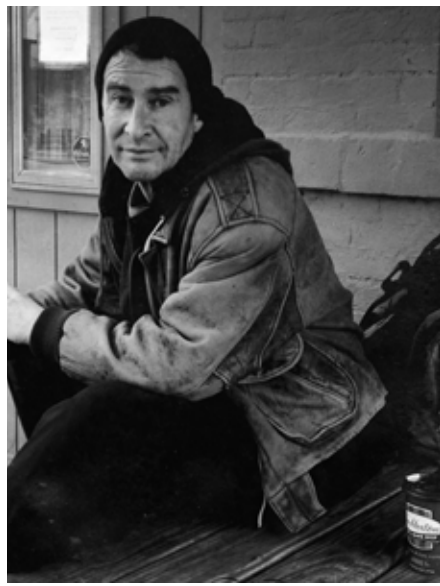
[rwood@dimitri-house.org](mailto:rwood@dimitri-house.org)  
(585) 330-5934





“Every life deserves a certain amount of dignity, no matter how poor or damaged the shell that carries it.”

-Rick Bragg, Pulitzer Prize-winning journalist and writer





## About Us

We strive to serve our neighbors in need with love, compassion and dignity, and to join them in their struggle.

We are a 501(c)(3) non-profit organization built upon the belief that every human being has immeasurable value. We serve those in need in the Rochester, New York community by offering a range of programs including food, shelter, and services that help them on their journey toward self-sufficiency. We have two full-time employees, a part-time maintenance person, a volunteer board of directors, and more than 100 volunteers. Our annual budget is approximately \$175,000 and our support comes from grants, fund raisers, church donations, private donations, and United Way donor option. We keep it simple—we don't do it all, but what we do is done well.

The future of success will continue to depend upon our donors. The **Shepherds Circle** was created to provide just that.

