

## **HELPFUL INFORMATION, GUIDELINES & TIPS FROM BROOKWOOD'S DEVELOPMENT OFFICE**

Making Friends First and Faithful Stewardship are the cornerstones of our approach to fundraising. By Making Friends First, we want to provide opportunities for every donor to give in the way he or she gives best.

Faithful Stewardship is to show gratitude and exercise discernment when managing both the financial and physical resources God has provided us while maintaining excellence.

*"If you have not been trustworthy of some else's property, who will give you property of your own."  
Luke 16:12*

### **Why Donate?**

Donors provide the means to keep Brookwood growing and going strong by underwriting approximately 20% of Brookwood's annual operating budget. We are grateful for the support of civic and religious groups, organizations, foundations, corporations, and thousands of individuals like you. With your help we can continue to operate Brookwood independent of government funding.

The Brookwood Community is incorporated as a 501(c)(3) non-profit organization, Tax ID number 74-1587672. Donations to Brookwood are tax-deductible as allowable by law. [Link to public version of 990]

### **Get Involved**

There are many exciting opportunities at Brookwood to make new friends and learn what Brookwood is all about. Whether you attend an event, donate or volunteer, your participation makes you an important part of our community!

### **I BELIEVE IN BROOKWOOD**

**I Believe in Brookwood** is the fall fundraising campaign that carries on the legacy of Brookwood annual Golf Benefit and is Brookwood's largest fundraiser to support general operating expenses. Citizens' families and friends of Brookwood create fundraising teams captained by the Citizen and reach out to their contacts to raise as much as they can for Brookwood using a crowd-funding website. Prizes and recognition are given to successful fundraising teams.

Proceeds help underwrite scholarships, staff salaries, enterprise programs, and so much more. More than 97 cents of every dollar raised goes directly back into the programs and services that bring meaning and purpose to our Citizen's lives and allows Brookwood to continue to operate without government funding.

Here's how you can participate:

Team Captain – Family and friends can co-captain a fundraising team with a Brookwood Citizen, or we will pair you up with a Citizen to raise funds and awareness for Brookwood!

Donate - Help a Citizen fundraising team reach their goal, or donate to the Dream Team, which represents all Citizens!

### **Biennial Benefit Lunch**

The Biennial Benefit Lunch raises awareness and support for Brookwood. This lunch is held in the Spring of even-numbered years and features a well-known guest speaker. The lunch is a wonderful way for families and friends of Brookwood to come together to support the ongoing needs, and also introduce new friends to Brookwood. The next Benefit Lunch will be held in April 2022.

### **Evening in the Garden Gala**

The Evening in the Garden Gala is held biennially in the odd-numbered years. This elegant cocktail dinner event is Brookwood's way to honor well-known Houstonians who have had significant impact on Brookwood and the Greater Houston community.

### **Bike to the Beach**

Join our Brookwood cycling team and support the Bike to the Beach event! Citizens and friends of Brookwood participate in this annual bike ride. This nationally-sponsored event raises money and awareness for individuals with autism and disabilities. Ride 100, 50, 25, or 12 miles to support Brookwood and have the experience of a lifetime!

### **General Operating Support**

Your gift for general operating supports all the programs and activities at Brookwood. Each and every donation, no matter how large or small, is important. Join us as we impact the lives of our Citizens, their families, and our community.

### **Scholarship Fund**

Brookwood believes no family should be turned away because of an inability to pay. In that spirit, many families need and receive tuition assistance on a sliding fee scale from Brookwood. We award over \$1.1 million in scholarship support each year and 33% of our Citizens receive financial assistance. Residential and day program fees are subsidized with financial assistance through Brookwood's Scholarship Program.

Per IRS rules, contributions designated to help pay for a specific Citizen's tuition are not tax deductible, as they are considered payment for services rendered. These payments should be sent to the Brookwood Business Office with the name of the Citizen noted.

Thank you for helping Citizens to achieve a life of opportunity, dignity and respect at Brookwood.

### **Memorial and Tribute Donations**

Brookwood is honored and humbled to be the recipient of memorial and tribute donations. Please send the name of the person being honored or memorialized, along with the name and mailing address of the person(s) to be notified. The notification sent to the honoree or relatives of the deceased will include the donor's name and address, but not the amount of the donation.

Sample text to include Brookwood for obituary notification:

*In lieu of flowers, the family requests memorial gifts be made to the Brookwood Community at [www.brookwoodcommunity.org](http://www.brookwoodcommunity.org) or mailed to The Brookwood Community, 1752 FM 1489, Brookshire, TX 77423.*

## WAYS TO MAKE YOUR GIFT

### Donate by Credit Card

Please complete the form so that we may properly acknowledge your gift. After submitting the form, you will be directed to PayPal to complete payment. You will have the option to check out as a guest, log in to your existing PayPal account, or set up a new PayPal account.

### Donate by Check

Please make your check payable to "The Brookwood Community" and mail, along with a note with any special instructions, to the following address:

The Brookwood Community  
Attn: Advancement Office  
1752 FM 1489  
Brookshire, TX 77423

### Recurring Monthly Donations and Electronic Funds Transfer

Monthly recurring gifts are a blessing and so important to the financial wellbeing of Brookwood. Your recurring gift is like a long hug that shows you care for Brookwood's Citizens. If you would like to donate via bank account, please set up automatic payments through your bank using the account information below:

**Amegy Bank of Texas**

**Account #0053740382**

**Routing #113011258**

**Swift/BIC Code: ZFNBUS55(ZB,N.A.)**

Please make sure to add a reference with your name and any additional details for the designation of the gift.

### Stock, IRA and Appreciated Securities Donations

Please contact the Brookwood Advancement Department before initiating your stock donation with the name of the stock, number of shares, and any additional information about your gift.

Provide your broker with the following information:

**Receiving Firm: National Financial Services  
DTC 0226**

**Account Name: The Brookwood Community Inc. Donation Holding Account**

**Account Number: 636-095078**

If you have any questions regarding stock donations, please contact:

Monroe Vos Consulting Group, Inc/MV Securities Group, Inc.  
1001 McKinney, Suite 1200, Houston, TX 77002  
Phone: (713) 227-0100 Fax: (713) 227-0347  
Cheri Strelecki – Cheri.Strelecki@MonroeVos.com

## **MORE WAYS TO SUPPORT BROOKWOOD**

### **Capital Gifts**

Capital gifts are for major fundraising initiatives such as buildings and other major projects. The most recent capital campaign, *Brookwood and Beyond*, was successfully completed in 2019.

### **Endowment**

A robust endowment provides a critical source of financial stability and revenue. With the principal invested wisely and managed carefully, endowment funds provide a steady flow of income to support scholarships, maintenance of buildings and grounds and funds for programs. Donations can support the general endowment or be designated by the donor for a specific purpose, such as scholarships, programs or maintenance of facilities. Minimum gift amounts and annual distributions to the operating budget are determined by endowment policy to insure a secure future while supporting present needs. The current minimum gift amount for a named endowment fund is \$25,000.

### **Planned Gifts – Brookwood Visionary Society**

Donors who have named The Brookwood Community as a beneficiary of their will, trust, life insurance policy, retirement plan, or other planned gift arrangement are invited to become members of the Brookwood Visionary Society. This program is a meaningful way for us to say “thank you” to individuals who are helping ensure the continuance of Brookwood’s mission with a planned gift. If you have included Brookwood in your estate plans, please contact the Advancement Department so we can thank you for your visionary gift.

The first step in leaving a legacy is to make sure you have an up-to-date will and estate plan. While it is important to consult a qualified attorney for help, the following language can be used when making a bequest to The Brookwood Community:

“I give and bequeath to The Brookwood Community \_\_\_\_\_ [written amount, percentage of estate, or description of property] to be used as determined by its Board of Directors”

### **Matching Gifts**

If your company has a matching gift program, please forward the paperwork or link to the Advancement Department so that we can complete the non-profit portion.

### **Gift-In-Kind**

If you would like to donate an item to The Brookwood Community, please contact our receptionist with detailed information about the item(s) so that we can determine if it can be put to use to benefit our Citizens. Upon acceptance of the gift-in-kind, you will receive a form to complete and be contacted to arrange delivery.

## **BROOKWOOD ADVANCEMENT TEAM**

We are here to serve you! Should you have any questions or need additional information, please contact us directly. Thank you for your generous support of Brookwood! Our offices are in the Reynolds Building, Administration first floor, north hallway. Fax: 281-375-2160

### **Carol Ostlind Thornburg – Chief Advancement Officer**

Contact re: Individuals and Foundation Major Gift Donations; Capital Campaign; Endowment; Brookwood Visionary Society; Scholarship Fund; and questions regarding the Advancement office.  
Direct: 281-375-2110  
Email: carolt@brookwoodcommunity.org

### **Jana Mullins Danna – Director of Outreach and Community Relations**

Contact re: Brookwood Center for Learning Conferences; Book Presentations and Signings by Mrs. Yvonne Streit; Community Engagement Opportunities  
Direct: 281-375-2260  
Email: janam@brookwoodcommunity.org

### **Donna Gower – Senior Development Director**

Contact re: I BELIEVE IN BROOKWOOD; Benefit Luncheon, Evening Gala, Open House  
Direct: 281-375-2192  
Email: donnag@brookwoodcommunity.org

### **Jennifer Tiedt – Senior Marketing and Communications Manager**

Contact re: Website, Marketing and PR; Third-party events benefitting Brookwood  
Direct: 281-375-2114  
Email: jennifert@brookwoodcommunity.org

### **Karen Pollard – Volunteer Manager**

Contact re: Individual volunteer opportunities; group and corporate volunteer opportunities; corporate donations  
Direct: 281-375-2220  
Email: karenp@brookwoodcommunity.org

### **Angela Minotti– Donor Services Manager**

Contact re: Stock Donations; Updates to Mailing Lists; Donation Receipts; Online Giving; In Memory and In Honor Gifts and Notifications.  
Direct: 281-375-2174  
Email: angelam@brookwoodcommunity.org

### **Joanne Clark – Receptionist and Tour Coordinator**

Contact re: General information about Brookwood; In-kind donations; group tours; conference and event space usage  
Direct: 281-375-2274  
Email: joannec@brookwoodcommunity.org