

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

### ***How Donors Support Brookwood***

#### **THEY DONATE TO OUR GENERAL OPERATIONS**

**...and help keep Brookwood growing and going strong** by underwriting approximately 20% of Brookwood's annual operating budget. The balance of the budget is supported by program/tuition fees (40%) and enterprise revenues (40%), as well as allocated return from the Brookwood Endowment. We are grateful to count among our donors thousands of individuals, civic and religious groups, foundations and corporations. With this help we are able to operate Brookwood independent of government funding.

Donors also support Brookwood's operations through annual fundraising events, including:

- Annual Golf Benefit – This is not a pay-to-play golf tournament. Each year we aim to deploy at least 100 fundraising teams (golfers & non-golfers) who will each raise at least \$10,000 in donations for Brookwood. The actual golf event is held each fall as a thank you celebration for our incredible fundraising teams. In recent years, the Golf Benefit has raised over \$1 million annually for less than 3% expenses.
- Biennial Benefit Lunch – This is one of Brookwood's premiere fundraising events. The Lunch, held in the spring in the "even years" at the Hilton Americas-Houston, features a guest speaker and is attended by close to 1,000 people, including many corporate and civic leaders.
- Biennial "An Evening in the Garden" Gala – River Oaks Country Club and Houston Country Club have been the venues for this elegant cocktail & dinner event. It is held in the spring in the "odd years" and is chaired by friends of Brookwood who enthusiastically champion our cause in the community.

#### **THEY DONATE TO THE CAPITAL CAMPAIGN**

**...and help build Brookwood's facilities, provide start-up funding, and boost the Endowment.**

- Our current \$34 million capital campaign (the eighth since Brookwood's inception) is the most ambitious we have launched in our 30 year history. Key initiatives include a new 41,000 sq. ft. "Enterprise & Education Building" to provide more jobs for more adults with special needs, two additional residential opportunities for citizens, renovating the existing Handcrafts building to provide expanded therapy and activities programs, two off-campus Handcrafts buildings to provide expanded therapy and activities programs, two off-campus retail and day program ventures, further development of our formal outreach program, and infrastructure improvements such as electrical and water/sewer upgrades, zoning the campus to facilitate safer pedestrian and traffic flow, and security enhancements. Start-up operating funding for expanded programs associated and the boosting of Brookwood's Endowment are also part of this historic campaign.

## **THEY DONATE TO THE ENDOWMENT FUND**

**...and help secure Brookwood's future.** Donor-restricted and Board-restricted funds designated for the Endowment are stewarded by an Investment Committee of volunteer financial specialists. Donations can be designated to the General Endowment or designated for a specific program of Brookwood's mission.

### ***Ways to Donate***

## **YOUR DONATIONS ARE TAX-DEDUCTIBLE AS ALLOWABLE BY LAW**

Brookwood is incorporated as a 501 (c)(3) non-profit organization under the name of "Briarwood-Brookwood, Inc." Our tax ID number is: 741587672.

Year-end gifts must be made by December 31 for credit in current year. Gifts made by check must be postmarked by December 31. Gifts by credit cards must be processed on our website donor form by December 31. Please do not mail a credit card donation or stock donation form as we may not be able to process it until after December 31.

## **DONATIONS BY CREDIT CARD**

You can make a donation by credit card online (see **ON-LINE GIVING**), or by contacting the Development Office. Information required: Credit card type (Visa, MasterCard, American Express, Discover); Card number; Expiration date; V-Code; Authorized signature.

## **DONATIONS BY CHECK**

Please make your donation payable to "Brookwood Community" and send the check, along with a note if designated for a special project, to the following address:

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

## **"IN HONOR OF" and "IN MEMORY OF" DONATIONS**

Along with your donation, please send the name of the person(s) 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.

## **MONTHLY DONATIONS VIA AUTOMATIC PAYMENT FROM YOUR BANK ACCOUNT**

If you want to donate by via automatic payment from a bank account, please set it up with your own bank. All electronic transfers for donations should be directed to the following account:

Amegy Bank of Texas  
Account # 0053740382  
Routing # 113011258

Please make sure to reference, on the transfer, who is making the donation and what the money is designated for. For additional information, please contact Pam Rawson in the Business Office at 281-375-2272 or pamr@brookwoodcommunity.org

### **ONLINE GIVING**

Go to [www.brookwoodcommunity.org](http://www.brookwoodcommunity.org) and from the home page access the donation page from the "Donate" button (right menu, bottom). After submitting your information on the Donation Form, you will be routed to a new page to make your donation by credit card on PayPal. **You do not need a PayPal account to complete the transaction.**

### **STOCK DONATIONS – A TWO STEP PROCESS**

1. Please notify in the Development Department when a stock donation is to be made (name of stock, shares, and designation of gift).
2. The information below should be provided to the donor's broker in order to send stock gifts to Brookwood. Donors may contact the Monroe Vos Operations department at 713-227-0100 should there be any questions (emails are also provided below).

**Receiving Firm: National Financial Services**

**DTC: 0226**

**Account Name: Briarwood-Brookwood Inc. Donation Account**

**Account Number: KMG-760285-301**

Operations Contacts:

- Cheri Strelecki – [cheri.strelecki@monroeivos.com](mailto:cheri.strelecki@monroeivos.com)
- Christy Haleta – [christy.haleta@monroeivos.com](mailto:christy.haleta@monroeivos.com)
- Kelly Pohl – [kelly.pohl@monroeivos.com](mailto:kelly.pohl@monroeivos.com)

The Monroe Vos Consulting Group, Inc. / MV Securities Group, Inc.  
1001 McKinney • Suite 1200 • Houston, TX 77002  
713-227-0100 (p) • 713-227-0347 (f)

### **BROOKWOOD VISIONARY SOCIETY**

This program is a meaningful way for us to say "Thank you" to Brookwood family members and friends of our mission who have named The Brookwood Community as a beneficiary of their will, trust, life insurance policy, retirement plan, or other planned gift arrangement. Through their visionary commitment, these individuals are helping ensure the continuance of Brookwood's mission. If you have included Brookwood in your estate plans, please contact the Development Office so we can also thank you for your visionary gift.

The first step toward 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, following is language that could 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: WILL YOUR COMPANY MATCH YOUR DONATION?**

Should your company have a matching gift policy, please forward the required paperwork to the Development Office to complete the non-profit portion.

## **GIFT-IN-KIND DONATIONS**

If you, your family or friends would like to donate a gift-in-kind item (such as a wheelchair, computer, etc.) please begin by contacting Joanne Clark, our receptionist at [receptionist@brookwoodcommunity.org](mailto:receptionist@brookwoodcommunity.org) or at 281-375-2100. Joanne will help determine if Brookwood can use the item. If so, and upon Brookwood's receipt of the gift-in-kind, Joanne and the donor will complete gift-in-kind form to describe what item/items were received, including the donor's name, address and phone number. This form will be sent to the Development Office so a gift-in-kind receipt and thank you letter can be sent from Brookwood.

Sometimes donors drop gift-in-kind items off at the homes, the stores, the clinic, or anywhere else on campus. If so, it is important that the donor contact Joanne (preferably the day the donation is delivered to Brookwood) to make sure the gift-in-kind information is recorded properly and a gift-in-kind receipt and thank you letter can be sent in a timely manner.

## **THE DIFFERENCE BETWEEN TUITION PAYMENTS & TAX DEDUCTIBLE DONATIONS TO THE BROOKWOOD SCHOLARSHIP FUND**

If your extended family or friends want to help pay for your citizen's tuition, they can make a check payable to Brookwood and note that this is "payment for (name of citizen) tuition." Since this is a payment for a service rendered, per IRS rules Brookwood cannot issue a donation receipt for tax deduction purposes. The check needs to be mailed to the attention of "Brookwood Business Office." The Business Office will issue a receipt for payment paid. For more information, please contact Patsy Romano in the Business office at [patsyr@brookwoodcommunity.org](mailto:patsyr@brookwoodcommunity.org) or at 281-375-2129.

Brookwood provides approximately \$1 million annually in scholarships to qualifying citizens. If your extended family or friends want to make a donation to the Brookwood Scholarship Fund, they can make the check payable to Brookwood and note that this is for "Scholarship Fund." The check needs to be mailed to the attention of "Brookwood Development Office." Since this is a donation, they will receive a donation receipt for tax deduction purposes from the Development Office. NOTE: They cannot mention on the check or in any correspondence sent with the check that this is for a specific citizen's tuition. If they do, and per IRS rules, we cannot issue a donation receipt for tax deduction purposes. Also note that all citizens who qualify for tuition assistance at Brookwood benefit from the Scholarship Fund. For more information, please contact the Development Office.

## ***Brookwood Development 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 located in the Reynolds Building, Administration first floor, north hallway. Fax: 281-375-2160

**Carol Ostlind Thornburg** – Chief Development Officer

Contact re: Capital Campaign; Endowment; Major Gift Donations; Brookwood Visionary Society; Scholarship Fund; and questions regarding the Development office.

Direct: 281-375-2110

Email: [carolt@brookwoodcommunity.org](mailto:carolt@brookwoodcommunity.org)

**Jana Mullins Dana** – Director of Outreach and Community Relations

Contact re: Brookwood Center for Learning Conferences; Volunteer coordination; Book Presentations and Signings by Mrs. Yvonne Streit

Direct: 281-375-2260

Email: [janam@brookwoodcommunity.org](mailto:janam@brookwoodcommunity.org)

**Jennifer Teidt** – Senior Marketing and Development Officer

Contact re: Website, Marketing and PR

Direct: 281-375-2192

Email: [jennifert@brookwoodcommunity.org](mailto:jennifert@brookwoodcommunity.org)

**Debbie Coomer** – 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: [debrac@brookwoodcommunity.org](mailto:debrac@brookwoodcommunity.org)

**Ashley Satterfield** – Special Events Manager

Contact: re: Open House, Benefit Luncheon, Evening Gala, Golf Benefit

Direct: 281-375-2192

Email: [ashleys@brookwoodcommunity.org](mailto:ashleys@brookwoodcommunity.org)