

# Ability Partners Foundation Legacy Society

as of January 1, 2022

Anonymous (3)  
IMO William and Mildred Archibald\*  
~ Gerald Archibald  
Estate of Harold Augustin\*  
Jeffrey & Carol Baker  
Charles & Barbara Battle  
Roy M. & Nancy J. Beecher  
MJ, Mike, and Nanci Bentley  
Andrea Bonafiglia  
Mary Walsh Boatfield  
Margaret D. Burns T.U.A. Trust\*  
David & Jane Case  
Michael & Cheryl Coppola  
Estate of Ann M. Cigna\*  
Amy Cram  
Patricia L. Cunningham  
Paul & Tina Davidson  
Estate of Robert M. Derr\*  
DeTorio Family Living Trust\*  
Estate of Richard G. Ensman Jr.\*  
Catherine & Elmar Frangenberg  
Craig & Eileen Gage  
Mark & Mary Gearan  
Charles & Donna Graham  
Henrietta Ann Hamilton\*  
Muriel J. Hanselman\*  
Richard & Linda Hawks  
Estate of Michael Hawley\*  
Helen K Helphrey\*  
Harold J. Hickey\*  
Robert F. Horn\*  
John Horvath\*  
Rodney B. & Cynthia W. Janes  
Memorial Fund\*

Estate of Frances Arline Kenyon\*  
James King  
Estate of Mary P. Kubanka\*  
Betsy Kubiak  
Ann E. Kurz  
Estate of Ralph A. Lomio\*  
Robert C. Maddamma  
Estate of Margaret McGrath\*  
Brian & Kelly Meath  
~ Terry Meath Memorial Fund  
Estate of Nancy J. Perry\*  
Arther B. Plyter Trust\*  
Estate of Addison N. Ringler\*  
Estate of Alice E. Ringler\*  
Natalie A. Ross Revocable Trust\*  
Pasqualina D. Schifano\*  
Ann M. Schneider\*  
Eugene R. Schneider\*  
Estate of Marjorie Simmons\*  
Diana Smith  
Estate of Hazel C. Smith\*  
Estate of Virginia Caroline Smith\*  
Joseph and Irene Skalny  
Charitable Trust  
Elsa & Nick Steo  
Estate of Virginia P. Thiede\*  
Estate of Dr. Bernard Tofany\*  
Estate of Robert G. & Florence E.  
Van Duyn\*  
Sara Volta Memorial Contributions\*  
Marion M. Wegman\*  
William & Joyce Weir  
Elizabeth K. Wise\*

# PLANNED GIVING

**Experience a community that is  
“Opening Doors and Enriching Lives” so that  
“What Happens Here Changes Lives Forever”  
and provides “Work. Wellness. Independence.”**



PROVIDING PHILANTHROPIC SUPPORT TO



## Ability Partners Foundation - Our History

Ability Partners Foundation (APF) was founded in 2009 providing philanthropic support benefiting three organizations: CP Rochester (CP), Happiness House (HH) and Rochester Rehabilitation (RR).

APF (formerly known as Happiness House Foundation) served as an independent corporation that provided funding support for HH, also an independent corporation. In 2014, HH and CP formally affiliated by becoming subsidiaries of a newly formed passive parent organization, Ability Partners, Inc. (API). Later that year, Happiness House Foundation changed its name to APF and extended its funding support role to include CP.

In 2016, RR affiliated with HH and CP by becoming the third subsidiary of API. APF extended its funding support role to include RR. CP, HH, and RR led a collaborative approach in providing services in Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, and Yates counties. The alignment of business practices and operations has increased service efficiencies, all of which have benefited thousands of adults and children with and without disabilities in the Finger Lakes and Greater Rochester regions.



*“We strongly believe in and support the mission of Ability Partners. After decades of pointing to the burden of disability and discrimination, our societal attitudes have undergone dramatic changes. The developmentally challenged are welcomed and included and deserve our full support, shifting the emphasis to ability. As partners we listen to and respect one another’s wishes and dreams.”*

*- Dr. Elmar and Catherine Frangenberg*

APF, through its management and expansion of restricted endowment funds, unrestricted funds, planned gifts, special events, and annual appeals is well situated to continue supporting the missions and visions of the three organizations.

## Who We Support

CP Rochester has provided compassionate support to adults and children with physical, intellectual, and developmental disabilities and their families since 1946. The caring staff works tirelessly to advocate for individuals so they may safely live as full members of their communities. Whether it’s finding housing opportunities, providing respite for family members, teaching a preschooler new and exciting things, or helping an adult learn to walk on their own for the first time, CP truly makes a difference in the lives of 2,500 people served every year in Livingston, Monroe, and Orleans counties.



Happiness House, a health and human services agency, has been serving communities in the Finger Lakes Region of Upstate New York since 1969. Today, with sites in Canandaigua, Geneva, Gorham, and Rochester, HH offers educational, therapeutic, recreational, residential, and family support services for children and adults, with and without disabilities, who reside in Monroe, Ontario, Seneca, Wayne, and Yates counties. On average, Happiness House serves 1,500 families each year.

Rochester Rehabilitation’s values – work, wellness, and independence – have remained at its core throughout its history. It has served the



Rochester community since 1919 with an array of physical, mental health, and employment services. The agency serves 2,800 people every year living with physical and cognitive disabilities, as well as veterans, refugees and individuals living in poverty.

## What Is Planned Giving?

A charitable/planned gift is:

- An irrevocable or revocable gift.
- A creative way to give, using different types of assets.
- A way for donors to make gifts to an organization and receive financial benefits for themselves.
- A way for donors to make larger gifts than they thought possible; and for some donors, the only way to make a major gift.
- A way to help donors achieve philanthropic and financial objectives.
- A way to offer substantial assistance to one's charity of choice.

There may be major tax savings associated with gift planning.



*“Ability Partners Foundation and the three agencies it supports - Happiness House, CP Rochester and Rochester Rehabilitation – provide services to people in our community in so many ways. Utilizing planned giving is a way for donors to assure that those services will continue to be provided, whether it be made during the donor’s life or afterwards.”*

*Jeffrey & Carol Baker*

## How Can You Benefit?

### GIFTS OF CASH OR ANNUITIES

Charitable gifts in the form of cash donations are flexible and convenient for the donor, with the benefit of an income tax deduction. In addition, there is an immediate impact on APF. You may specify your gift be applied to our Endowment Fund or used for a specific purpose that is close to your heart. We can help by letting you know more about the needs of CP, HH and RR.

### Lifelong Support

*“Among the wide array of services available, the traumatic brain injury and neurological impairments program hits very close to home for me.*



*A dear friend, Paul, suffered a traumatic brain injury. His recovery process has made me keenly aware that services to help individuals and their families identify and accept residual impairments also lead to greater understanding.*

*My stock contributions will help Ability Partners Foundation lay the solid groundwork necessary to ensure a certain and protected future for CP Rochester, Happiness House, and Rochester Rehabilitation. I am pleased to be able to do so.”*

*Betsy Kubiak*

## ***Experience a community that “Opens Doors and Enriches Lives” so that “What Happens Here Changes Lives Forever” and provides “Work. Wellness. Independence.”***

### **ABILITY PARTNERS FOUNDATION’S ENDOWMENT FUND**

APF is proud to offer the opportunity for planned giving through our Endowment Fund. The fund’s goal is to provide a lifetime of support for children and adults with and without disabilities served by CP, HH, and RR - now and in the future. Contributors will help to ensure that the future will be bright and that individuals with and without disabilities will be able to realize the opportunities they so richly deserve. With a bequest to the Endowment Fund, you will know that your spirit of caring will live on and continue to touch the lives of children and adults with and without disabilities year after year.

### **Happiness is Helping**

*“Growing up with a cousin with a developmental disability, I understand the impact these types of organizations have on the lives of individuals who have disabilities and their families. I know that my investment of finances, time, and energy will help many children and adults with special needs. By enabling our agencies to be less dependent on such sources of revenue, as government aid, the Endowment Fund ensures that individuals, programs, and initiatives have the unwavering support they need.”*



*Charles T. Graham*

### **SECURITIES AND RETIREMENT ASSETS**

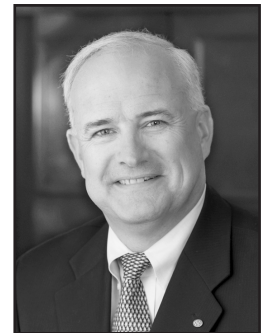
Gifts of appreciated property - securities or bonds - may provide more advantages than a cash gift in the same amount. They may not only generate a charitable income tax deduction, but a capital gains tax may be avoided.

---

### **What Matters Most**

*“Aside from the benefit received in knowing that you have made a difference in the lives of others, there are many tangible and immediate benefits as well. A planned gift can enable you to:*

- *make a gift that costs you nothing during your lifetime*
- *make a gift that pays you income for life*
- *make a gift of appreciated securities resulting in a larger donation and tax savings than if you used cash*
- *donate your house, take a tax deduction, and continue to live in it for life*
- *turn life insurance into a gift for Ability Partners Foundation and*
- *preserve your estate for your children and deliver years of income to CP Rochester, Happiness House, and Rochester Rehabilitation.”*



*Richard H. Hawks Jr.*



## BEQUESTS

By naming APF as a beneficiary in your will, you can provide for the organization's future without affecting your family's current financial security. The tax savings to your estate can be considerable. You may designate a specific dollar amount or a percentage of your estate, or you may choose one of several other forms of the bequest that most closely fits your interests and the needs of your family.

---

---

## On Giving Back

*"Having my son, Ty, who has a disability, gave us an appreciation for organizations that can make a difference for families in need of special services.*

*Planned giving was the perfect "win-win" scenario for us. It was an easy way to give back to a valuable service provider, without having to impact our current financial resources.*

*We feel good that we have helped to ensure the future of CP Rochester, Happiness House, and Rochester Rehabilitation - and know that Ty will be taken care of if we become unable to do so."*

*Michael A. Coppola*



## LIFE INSURANCE

A life insurance policy that you already own but may no longer need (mortgage insurance, college tuition insurance) can become an ideal gift. You may purchase a policy naming APF as a beneficiary through any licensed company and agent.

---

---

## Leaving a Legacy

*"These organizations will be the beneficiary of proceeds of a life insurance policy that I purchased. I am excited to make this donation.*

*My primary goal, in addition to providing much needed financial support for the agencies, is to ensure that the names of my parents, William and Mildred Archibald, live on after I leave this earth. Sharing the financial success that I have enjoyed in my life, beyond all my expectations, is one small way to honor their memory for my wife Betsy and me, their grandchildren, and generations of Archibalds to come.*



*I developed a philosophy on life from my parents' influence. It is very simple. Life is more than just living - it is about leaving a legacy. This donation will help to ensure that I honor the memory of my parents."*

*Gerald Archibald*

## How Will You be Remembered?

Few of us will actually change the course of history, write a timeless symphony, or cure a terrible disease; but everyone has an opportunity to leave an imprint on the world and make a difference in the lives of others. Every day, throughout the country, countless nonprofit organizations address society’s health, humanitarian, educational, cultural, social, economic, and spiritual needs. By supporting APF through planned giving, you can help to assure more fulfilling lives for future generations.



*“I’ve been working at the Federal Building for 36 years. I am so grateful to Rochester Rehabilitation. Because if I had never met them, I probably wouldn’t have a job. I don’t know what I’d do. I’d probably still be on welfare.”*

*~ John Hahn, employee and participant*

## Financial Advisement

APF recommends seeking legal or tax advisory service. For assistance with specific/contemplated gifts that fits well into your overall circumstances and planning, the services of an attorney or other professional advisor should be obtained. This material provides general gift, estate, and financial planning information. Tax revisions, state laws, wills, trusts, and charitable gifts made in a contractual agreements are subject to change.

## Contact Us

**To make inquiries regarding Planned Giving, contact:**

Cheryl Schaefer-Coppola, Vice President

Ability Partners Foundation and Development

585-412-9040 x1325

ccoppola@happinesshouse.org

## Our Mission

Ability Partners Foundation is a nonprofit organization established to raise and generate funds that will promote, support, and augment the continuation of long-term services for people with and without disabilities offered by CP Rochester, Happiness House, and Rochester Rehabilitation in the Finger Lakes and Greater Rochester areas including Livingston, Monroe, Ontario, Orleans, Seneca, Wayne, and Yates counties.

## Our Vision

Ability Partners Foundation will provide the necessary resources to ensure that all individuals receiving services through CP Rochester, Happiness House, and Rochester Rehabilitation will experience “What Happens Here Changes Lives Forever” in a community that is “Opening Doors and Enriching Lives” and provides “Work. Wellness. Independence.”

## Board of Directors

### Executive Leadership

Mary Walsh Boatfield,  
President & CEO

Rene Sandroni,  
CFO

Cheryl Schaefer-Coppola,  
Vice President

### Officers

Richard H. Hawks Jr. – Chair  
Jeffrey W. Baker – Vice Chair  
Joyce W. Weir – Secretary

Roy M. Beecher – Treasurer  
Elsa Steo – Immediate Past Chair  
Charles T. Graham – Founder

### Directors

Charles Battle  
Nanci Bentley  
Michael A. Coppola  
Amy Cram

Lee Curtis  
Paul Davidson  
Catherine Frangenberg

Eileen Gage  
Brian P. Meath  
Diana Smith  
Jeanie Smith

### Advisors

Gerald Archibald  
John Bartholf  
Ann Costello

Mark Gearan  
Betsy Kubiak  
Robert Schick