

## PLAN OF PA FOUNDATION

Created to ensure that PLAN of PA will sustain and enrich the lives of future generations of adults in Greater Philadelphia with mental illness, autism, intellectual disability or brain injury.



PLAN OF PA  
FOUNDATION



"I wanted the Foundation to show that PLAN of PA could be counted on to be there for the lifetime of its clients, so families could trust in the organization's care plans and services."

- Anne Zetterberg,  
donor of the seed money for  
the PLAN of PA Foundation



"One generation  
plants the trees...  
Another gets  
the shade."

Sustaining and enriching  
the lives of future generations



PLAN of PA Foundation  
P.O. Box 154 • Wayne, PA 19087  
610.687.4036

[www.planofpa.org](http://www.planofpa.org)

Tax ID #20-4171965

*The PLAN of PA Foundation will send an appropriate notification of your gift, whether it's in your name or you'd like to designate it as a special tribute to a person who has meant so much to you. The information in this brochure is not intended as legal advice. Please consult with your attorney or tax advisor when making your giving arrangements.*



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## A Foundation for the Future



Families who care for a loved one with a mental disability recognize that planning and care ensure a positive future. Equally important is the right support circle.

Many caregivers supplement county services with private mental health services. Others go it alone to ensure that their loved one gets the appropriate care they need. But who will be there to step in any time a family member is not able to do so? In these instances, PLAN of PA can help.

PLAN of PA has been providing private Planning, Trust and Care Management Services to adults in Greater Philadelphia with mental disabilities since 1989.

And now you can help ensure that our vital services continue for future generations of this underserved population by being an important part of the PLAN of PA Foundation.



## She planted a seed....



The PLAN of PA Foundation was created in 2006 by Anne Zetterberg, a former Board member of PLAN who recognized the organization fills a vital gap that no other mental health organization provides.

Anne's generous gift was made to ensure that PLAN of PA will have the funds needed to sustain and enrich the lives of future generations of adults with mental disabilities in the Greater Philadelphia area.

We invite you to help build these funds by designating a gift to the PLAN of PA Foundation.

## A Gift of 'Forever Funding'

By leaving a legacy through a gift in your will, trust, retirement plan or life insurance policy, you provide forever funding for the important services of PLAN of PA.

Some people think they must choose between leaving a gift to their family or to their favorite charity. You can do both, and some charitable gifts may actually save your family money by decreasing inheritance taxes.

## ...Now Help it Grow

There are several ways you can make a difference in the lives of future generations of adults with mental disabilities:

- *Include a simple directive in your will or revocable trust that includes the PLAN of PA Foundation.*
- *Leave gifts of cash, stock, or securities to the PLAN of PA Foundation.*
- *Achieve additional tax savings by making the PLAN of PA Foundation a beneficiary of your life insurance, 401(k) plan or IRA.*

## Start Today!

Join Anne Zetterberg and other visionaries who see the unique work PLAN of PA is doing in our community and wish to build a better future for adults in Greater Philadelphia with mental disabilities.

- *Mail in your contribution, made payable to the PLAN of PA Foundation, P.O. Box 154, Wayne, PA 19087.*
- *Call Ginny Koehler, Executive Director of PLAN of PA Foundation, at 610-687-4249 or email her at [gkoehler@planofpa.org](mailto:gkoehler@planofpa.org) if you have questions about directing your gift to the PLAN of PA Foundation.*

“I am excited by this new phase of the PLAN of PA Foundation, one in which the organization starts to add to the Foundation a little each year, keeps it growing, and really harnesses the power of investing over time. It is really a dream come true to see the Foundation entering this stage.”

- Anne Zetterberg