

The Arc of Frederick County
ENDOWMENT EDITION
SPECIAL REPORT

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Endowment Reception

On Wednesday, November 3rd, The Arc of Frederick County celebrated the achievements of its Endowment Fund at a reception hosted by Ken and Roy Bromfield at The Red Horse Restaurant. The reception began with the unveiling of a new poster highlighting the new name of the fund which is now, “The Betty Ann Ramsburg Endowment Fund,” emphasizing how many lives Betty Ann Ramsburg touched through her own life, and also by what she inspired her family to do.

Throughout the evening, The Arc of Frederick County honored the individuals who have been critical to the process of raising over one million dollars to the endowment. With a total of 57 Founders’ Circle Members, donating \$10,000 each, the three newest donors were recognized. They were, The Delaplaine Foundation, Special Friends of The Arc, and Frederick Mutual Insurance, who has made a second \$10,000 commitment.

Guest speakers that evening were Betsy Day, President of The Community Foundation of Frederick County, speaking on the Importance of an Endowment and Jean Doyle, Support Coordinator for The Arc of Frederick County, speaking on the importance of Futures and Estates Planning. A special award was presented to Bev Shelton for her continued support and dedication to the Endowment Committee since its inception. Bev received a standing ovation upon the receipt of her well-deserved award.

It was a wonderful evening filled with excitement over the progress and accomplishments of the fund over the last decade. In 1998, The Arc of Frederick County initiated an Endowment Campaign, set up and invested by The Community Foundation of Frederick County. The fund is designated to provide a means for helping families plan for the future of their son or daughter with a developmental disability.

Once again, The Arc would like to thank the Endowment Committee; Ken Bromfield, Josh Brooks, George T. Horman, Clayton Minnick, Jacob R. Ramsburg, Jr. and Bev Shelton for working with us to host this event.



We wanted to bring you this Special Report of the Endowment Edition to let you know of the most recent exciting accomplishments of The Betty Ann Ramsburg Endowment Fund. We hope you enjoy this edition as we want to keep you as partners updated throughout our expansion of Futures & Estate Planning Services.

We cannot thank you enough for your continued support in this worthwhile investment.

For more information on The Arc’s Endowment please contact me at:

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-Shauna Clay



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Mission Statement

The Arc of Frederick County provides advocacy, access to resources, and assistance in increasing individual and family connections for people with developmental disabilities. The organization seeks creative solutions to help people with developmental disabilities attain their goals.



Futures & Estate Planning by Jean Doyle



During the last month I have had the pleasure of working with new families on Futures & Estate planning. One mother and adult son live together and provide each other with support. The mother had some serious health problems over the last year and wanted some assistance from The Arc to access services and make plans for her son's future support. Ann Vallandingham, through The Arc's Information and Referral Services, is helping the family find supports to meet their needs. I worked with the mom to help with her planning. She has been to an attorney and has had a Will and a Special Needs Trust completed. She has also completed her Power of Attorney and named her Health Care Agent. They are now working on their Letter of Intent. The mother has talked with relatives in the area and they have worked out future living plans for the son. He will be able to remain in the community with a lot of support from his extended family. The Special Needs Trust will supplement his income so that he will be able to continue to participate in the activities he enjoys and continue to live the life that he chooses. It is very rewarding to me to be able to assist a family in finalizing their individualized plans for future needs.

Another new family I met with, the father had serious health issues and is unable to work. His son is in middle school in Frederick. The father needs to make plans for his son's future care. He does not have a Will, nor has he named a guardian for his minor son, if the father were to die before the son is eighteen. The father has suffered from some minor strokes and needs to have some very definite steps in place to provide emergency care for his son if needed. I have a lot of work to do with this family to help them get everything in place that they need so the son's future is secure. Thanks to The Arc's Futures & Estate Planning Program, this family can receive support and guidance to help them make the best possible plans for the son's future. I feel very fortunate to be a part of this very important service that The Arc of Frederick County offers to our community.

Special Needs Planning by Mary Anne Williams



As we meet with families to help with planning for the future, we discuss three areas to be addressed: legal documents, financial planning, and communicating plans through a letter of intent. We assist families with a letter of intent, and present a fact sheet, "Choosing an Attorney," to refer families for help with legal documents. We sometimes get the question: Can you recommend a financial planner to help? So The Arc set about to fill this need.

On November 18, 2010, The Arc presented a seminar for financial planners, "Special Needs Planning: Who, Why and How." Led by attorney Jeanne Singer, the seminar addressed the specific legal issues of planning for the future of an individual with special needs. She explained specific details about public benefits available and which have asset limitations, the different types of trusts commonly used to protect assets, uses for a power of attorney, and issues related to medical care. As both an attorney and a CPA, Jeanne is uniquely qualified to lead this discussion.

In addition, Thomas Koontz provided insight from the parent's perspective. He shared the reasons why families may be reluctant to plan, obstacles to formulating a complete plan, and how to help families make successful plans.

Attending the seminar were insurance underwriters, certified financial planners and financial advisors. In their evaluations, all named specific topics which were new and helpful to them, and some have requested to be included on the mailing lists for other speakers and programs offered by The Arc.

