



THE CLARENCE BOYD JONES SOCIETY

How You Can Be a Part of Hadley's Continuing Legacy*

Donors who provide for Hadley in their estate plan are eligible to join The Clarence Boyd Jones Society. This may be done by:

Including Hadley in your will or trust

- Suggested wording to share with your attorney: I give ___% or \$___ to Hadley Institute for the Blind and Visually Impaired, an Illinois non-profit corporation located at 700 Elm Street, Winnetka, IL 60093, EIN #36-2183809.

Designating Hadley as a beneficiary

- You can use an IRA, life insurance policy, annuity or any other instrument that allows you to designate a beneficiary.
- Simply request and fill out a "change of beneficiary" form from the appropriate provider.
- You could name Hadley a full, partial or contingent beneficiary with the designated amount being tax-free.

Discuss additional options with your financial advisor or attorney.

*Please let us know if you plan to leave a legacy gift for Hadley so we can thank you and welcome you to The Clarence Boyd Jones Society.

To learn more about planned giving strategies, please contact Brooke Voss, Chief Development Officer, at 847.784.2774 or Brooke@HadleyHelps.org



700 Elm Street, Winnetka, IL 60093
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Promoting the growth and strength of Hadley's planned philanthropy program, these financial and legal professionals lend their time and expertise working with staff and donors through their advisors.

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ACHIEVE YOUR GOALS THROUGH
PHILANTHROPIC PLANNING

Meet Linné Dosé - Dedicated Hadley Volunteer and Donor

When Linné Dosé retired in 2009 from a 40-year career at Northern Trust Company, his wife suggested he make a list of how he wanted to spend his spare time. Music and travel, two of his passions, were high on this list, but "volunteer at Hadley" topped it.



Hadley holds a special place in Linné's heart. He first learned about Hadley in his youth because his best friend lived around the corner from our headquarters in Winnetka, Illinois. A family tragedy caused Linné to leave the area at a young age, but he later returned to nearby Glenview with his wife, Rachel, to raise their two sons.

Linné made his first gift to Hadley nearly 50 years ago, and he and Rachel have been consistent annual donors for the past 20. "If you have the resources, use them for good," he believes. Linné and Rachel are also members of The Clarence Boyd Jones Society because they have provided for Hadley in their estate plan.

The importance of Hadley's services hit close to home for Linné when

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Meet Linné Dosé – Dedicated Hadley Volunteer and Donor [Continued from Page 1](#)

cataracts impacted his vision in his 50s. Surgery has since corrected most of the loss, but the experience gave him a greater understanding of the challenges that accompany visual impairment.

Linné had a distinguished career as vice president and tax manager in the trust department at Northern Trust, but his favorite part of the job was the people. Friendly and engaging, he also enjoys visiting with Hadley staff during his weekly volunteer time. Over the past fifteen years, Linné has helped Hadley with many projects. His favorites include scanning decades of Hadley’s written records to put them in digital form and proofreading a range of publications for Hadley’s partnership with Bookshare, an ebook library for people who face reading barriers. These undertakings have been fun and interesting for a history buff like Linné who is curious about the world and likes to learn.

However, it is his strong belief in Hadley’s “vibrant and relevant” mission that keeps him coming back. He explains, “The need for Hadley’s services is growing among the aging population. I am impressed by how Hadley has transitioned and reinvented itself to address these pressing needs.”

Thank you, Linné, for your enduring dedication to Hadley.



Back to Basics: Estate Planning

Plan ahead—having an estate plan is one of the best ways to protect your family, loved ones and the causes you hold close to your heart.

But what happens when you don’t have a plan in place?

Without an estate plan:

- You have no say in to whom your assets are distributed.
- You lose your ability to choose legal guardians for your children and/or pets.
- You miss out on the chance to leave a legacy for your favorite causes.

Estate planning is the process of creating a master plan that facilitates the distribution of your property after your death and according to your goals and objectives. Knowing where to start can be challenging and breaking it down makes it less complicated.

Certain circumstances make estate planning more important:

- Your estate is valued at more than the federal estate and gift tax applicable exclusion amount or your state’s exclusion amount.
- Your children are minors or have special needs.
- Your spouse is uncomfortable with or incapable of handling financial matters.
- You own property in more than one state.
- You intend to make charitable contributions.
- You have special property such as artwork or collections.
- You have concerns about your health care and the decisions around it.
- You are concerned about privacy and want to avoid probate of your estate.

There are many estate planning strategies and documents that facilitate the distribution of your assets and the settlement of your estate according to your wishes. A good way to begin is to prepare an inventory of your assets and a list of beneficiaries. The next step is to engage an attorney who is experienced in estate planning. Your attorney will explain which estate planning documents are appropriate for you and what function each performs. Most estate plans include powers of attorney for health and property, a revocable living trust and a pour over will (a document that directs assets you own at the time of your death are transferred to a previously created living trust). Other possible estate plan options may include gifts and life insurance policies. If life insurance is part of the plan, an irrevocable life insurance trust may be created to own the policy.

Even after the estate plan has been completed, it should be reviewed regularly to be sure it is still the best plan. Life brings change. Marriages end. New spouses and children are added. The death of family members may require the updating of a document. Circumstances can occur requiring a change in will executors or trustees. A designated agent, executor or trustee could die or be unable to handle the job.

It is important to keep all estate plan documents in a secure place and be sure that those who have responsibilities know and have access to the location.

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