



PEGASUS

# The Pegasus Legacy Circle

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*Unbridled Opportunities for the Future*



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## **Our Mission**

The mission of Pegasus Therapeutic Riding is to enhance the lives of individuals with disabilities and challenges through equine-assisted activities and therapies.

## **Our Vision**

Our vision for Pegasus is a world-class center for creating quality of life and healing for individuals with disabilities and challenges, through the unique therapeutic modalities of equine-assisted activities and therapies, with leadership that represents the strength and support of our 40-year history.



Meet inspirational Pegasus student “Mighty Morgan” and learn how the Pegasus Endowment Fund will help us serve even more participants like her for decades to come. Video at [pegasustr.org/endowment](https://pegasustr.org/endowment).

Legacy is an ultimate gift, a torch passing from one hand to the next. Legacy ensures the meaning and values most precious to us will be secured and preserved for years to come. Solid, substantial, lasting—the Pegasus Legacy Circle represents all of these.

For 40 years, we have worked to enhance the quality of life for those facing challenges. Our goal is to facilitate greater independence in a joyful, non-judgmental environment. This has been the deeply rewarding work of staff and students, in partnership with the transformative power of the horse. Because of our work at Pegasus, we proudly can say thousands of lives have been changed.

***And now we’re ready for the next 40 years.***

The need in our community is high and expanding, as our industry understands the increasing number of ways in which equine-assisted activities and therapies can benefit people facing physical, developmental, emotional, and cognitive challenges.

The Pegasus Endowment Fund will benefit our programs, ensuring the continuing high quality of our classes, our instructors and our equine partners. We invite you to read on.

Warmly,

A handwritten signature in blue ink that reads "Sue McGraw".

Sue McGraw  
Board President

the Pegasus  
endowment  
fund



# our of record SUCCESS

Pegasus is a **PATH Intl. Premier Accredited Center**. We are reaccredited every 5 years and are held to the highest standards of our accrediting organization.

Since our founding in 1975, we have built a reputation as an industry leader in equine-assisted activities and therapies. Here are a few recent examples of recognition for the positive impact of our mission:

In 2016, PATH Intl. recognized Pegasus with three regional awards:

**Volunteer of the Year**

Sue McGraw

**Certified Professional of the Year**

Liz Fortes

**Equine of the Year**

Mr. Blue (Once in a Blue Moon)

In 2013, Pegasus won the *Westchester Magazine* **Best of Westchester** award for Best Horseback Riding for Children with Special Needs.

Also in 2013, News 12 Connecticut reporter Sarah Hagen won a **N.Y. Emmy Award** for her story about participant Christopher Hynes' Pegasus experiences.

# about our programs

Pegasus offers both therapeutic horseback riding and unmounted (non-riding) horsemanship programs.

The primary goal of our equine-assisted activities is **improvement in quality of life for our participants and their families**. Programs are designed to transfer lesson activities into everyday skills that build on one another.

Therapeutic riding lessons include instruction in basic riding skills, as well as opportunities for social interaction, recreation, and work with developmental concepts. Activities can produce improved mobility, balance, posture, coordination, language development, behavior control and concentration—all skills required in our students' daily lives.

In addition to riding lessons, Pegasus offers people with special needs, individuals at risk and trauma survivors the opportunity to participate in unmounted activities that provide therapeutic benefits through human/horse interaction. **Horses & Me** is our introductory-level horsemanship program. Lessons are adapted to students' abilities and may include horse leading and ground training, grooming, and learning about horse breeds, tack and equipment. **Horse Masters** participants focus on these core skills at a more advanced, vocational level, including learning about detailed tracking of a horse's daily routine and behavior. The **Wings** program provides equine-assisted activities to individuals at risk. In association with Allied Forces Foundation, Pegasus is also developing **Pegasus Patriots**, an equine-assisted veterans program planned for launch in 2017.

Our programs are made possible by the support of more than 300 skilled, dedicated volunteers donating over 10,000 hours per year.



# who we serve

Established in 1975 as one of the earliest therapeutic riding programs in the U.S., Pegasus serves individuals with a wide range of physical, cognitive, developmental and emotional challenges.

Special needs diagnoses include but are not limited to: autism, cerebral palsy, traumatic brain injury, multiple sclerosis, developmental disabilities, visual and hearing impairment, learning disabilities, language deficiencies, PTSD and other trauma-related conditions, and Down syndrome.

Individuals at risk served by Pegasus include but are not limited to: disadvantaged youth, adults with developmental disabilities, and trauma survivors.

Our PATH-certified instructors work with more than 225 children and adults from 90 towns in Fairfield, Westchester, Putnam and Dutchess counties each year.

Students are currently accepted as young as four years old. While the majority of our students are under the age of 18, we serve people at every stage of life.



# about our experts

Our Pegasus staff is a dedicated, experienced, highly credentialed team of caring individuals whose primary focus is to enhance the quality of life of our participants.

All Pegasus instructors are certified by PATH Intl. (Professional Association of Therapeutic Horsemanship).



## Our program team includes:

- 2 PATH Intl. Advanced Level Instructors
- 6 PATH Intl. Registered Level Instructors
- 1 PATH Intl. Region 1 Certified Professional of the Year
- 1 Occupational therapist
- 1 Physical therapist
- 1 American Hippotherapy Association National Board Hippotherapy Certified Specialist
- 1 Instructor certified in the EAGALA method of equine-assisted psychotherapy
- 4 PATH Intl. Equine Specialists in Mental Health and Learning
- 3 PATH Intl. Certified Mentors
- 3 Instructors certified in PATH Intl. Equine Services for Heroes
- 1 PATH Intl. Associate Evaluator
- 1 PATH Intl. Associate Accreditation Visitor
- 4 Special Olympics coaches
- 1 Special education teacher
- 1 New York State licensed educator
- 1 United States Equestrian Federation licensed Registered judge
- 1 ARIA-certified level 3 hunt seat/equitation instructor
- 1 ARIA-certified level 2 dressage instructor



## The Pegasus Endowment Fund

In conjunction with a \$1.5 million capital grant to build the Michele Arnhold Education Center (pictured above) in memory of former Pegasus volunteer Shelly Arnhold, the Arnhold Foundation has pledged a \$500,000 matching challenge gift to the Pegasus Endowment Fund.

## Your Gift Will Be Matched Dollar-for-Dollar

Every gift made to the Pegasus Endowment Fund through September 2017 will be matched dollar-for-dollar by a gift from the Arnhold Foundation, up to \$500,000.

This generous challenge gift creates the optimum time to **double your contribution** to the good work of Pegasus, sharing our vision for the bright future of our participants and their families. No administrative expenses will be funded by the endowment; 100% of the fund's income is earmarked for life-changing Pegasus programs.

Pegasus is a 501(c)(3) nonprofit organization funded almost entirely through charitable giving. The Arnhold Foundation endowment gift will help ensure the long-term financial stability of Pegasus and make it possible for us to continue serving people with special needs, individuals at risk, and military veterans for many years to come.

We invite you to join us in creating the next 40 years of success!

# funding the next 40 years

## The Pegasus Legacy Circle

Donors who join with the Arnhold Foundation to make their gifts to the Pegasus Endowment Fund will become permanent members of The Pegasus Legacy Circle.

Gifts of every level will be welcomed and matched, and Pegasus will give lasting recognition to Pegasus Legacy Circle members at these levels:

### **Grand Champion**

\$100,000

### **Champion**

\$50,000

### **Reserve Champion**

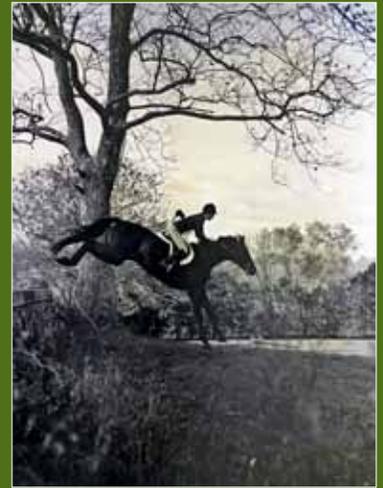
\$25,000

### **Blue Ribbon**

\$10,000

## About Michele "Shelly" Arnhold

Shelly Arnhold was a lifelong horse enthusiast, which she demonstrated both as an avid Amateur Owner Hunter competitor with many year-end championships to her credit, and through her desire to share her love of horses with those around her, especially young riders.



Shelly was equally committed to education. She dedicated much of her time to nurturing and guiding preschool children in the classroom. The blending of her two areas of expertise—horsemanship and teaching—made her a natural when she began volunteering for longtime friend Betsy Stein Medinger at Pegasus' former Corgi Hollow chapter in Newtown, Connecticut.

Through their charitable organization, The Arnhold Foundation, Shelly's family has donated \$1.5 million to build the Michele Arnhold Education Center at Pegasus Farm in Brewster. Construction began in February 2016 and is scheduled for completion in winter 2017.

The Arnhold family's generous gift will provide many opportunities for growth and enhancement. The Michele Arnhold Education Center will enable Pegasus to expand and diversify our programs, better integrate our educational programs into the barn environment, conduct industry-related workshops and certification courses, host community events, and create a space for volunteers, families and friends to gather to observe program activities or just relax and enjoy their visit to the farm.

We are deeply appreciative of the Arnhold family for their confidence and support of our organization and its mission. Pegasus is proud to be a part of this meaningful tribute to a wonderful woman, who we will continue to celebrate as a committed volunteer, equestrian and friend.

# fast facts about endowments

- ❖ The purpose of the Pegasus Endowment Fund is program support.
- ❖ Funds invested in the Pegasus endowment are a true endowment—they are invested in perpetuity.
- ❖ A generous gift from the Arnhold Foundation is providing a \$500,000 match through September 2017. All gifts to the Pegasus Endowment Fund during this time will be doubled.
- ❖ The Pegasus Endowment Fund can accept: gifts of cash; planned gifts and bequests; appreciated assets, including stocks and bonds, publicly traded securities, real estate, tangible property and life insurance; retirement assets; or annuities.
- ❖ The Pegasus Endowment Fund is under professional management with Hollow Brook Wealth Management, LLC.

## **Endowment funds benefit the organization by:**

- ❖ Creating a permanent source of income
- ❖ Enhancing the annual fund
- ❖ Allowing program expansion
- ❖ Providing independence
- ❖ Offering financial flexibility

## **Endowment funds benefit donors by:**

- ❖ Perpetuating donors' values and priorities
- ❖ Serving as a permanent tribute
- ❖ Making a significant investment in the future
- ❖ Allowing incremental funding
- ❖ Permitting additions at a later time



# our fund management team

To ensure scrupulous fiscal management that safeguards the growth of the endowment fund and is deserving of the trust of our donors, the **Pegasus Board of Directors** has taken several important actions.

We have retained **Hollow Brook Wealth Management, LLC**, a full-service wealth management firm known for its high standards for meeting the individual goals of every client. Hollow Brook President Philip Richter is our Pegasus Endowment Fund Advisor.

We have brought **Major Gifts and Endowment Officer** Amy Price onto our Pegasus development team. Her priority is to meet with donors, determine the most meaningful ways their support will impact our mission, and ensure their intentions are represented in the stewardship of their gift.

We have formed an **Investment Advisory Committee** to provide another level of oversight.

We have adopted a **Statement of Investment Policy** establishing objectives, policies and guidelines for an endowment fund to support the organization in perpetuity. The policy ensures that the principal of the endowment remains untouched and continues to grow, and that only the income on principal will be drawn annually.

Pegasus and Hollow Brook Wealth Management are committed to meeting your individual philanthropic dreams with expertise, care and responsiveness.



**Cash:** Outright cash gifts to endowment are fully deductible according to law. An accompanying letter or note on the check should indicate that the gift is for the endowment fund. Gifts of \$100,000 or greater may be used to establish a named fund.

**Stocks and Bonds:** Gifts of stocks and bonds will be accepted at fair market value. There may be significant tax benefit to appreciated stock held for more than a year—your tax advisor can assist.

**Real Estate:** Gifts of real estate will be reviewed and approved by our Board of Directors. Donors will be asked to provide clear title, a Phase I environmental assessment and a legal description of the property.

**Tangible Property:** The list of tangible property includes art, coins, jewelry, antique cars and other collectibles. The property needs to be salable and donors will need to agree that the property can be sold.

# menu of gift options



**Bequests by Will or Trust:** Donors can contribute to Pegasus as a beneficiary of a will or trust by naming the endowment as a recipient of:

- ❖ A specific bequest of money, assets or real estate
- ❖ A percentage bequest of an estate
- ❖ A residuary bequest, or remainder of estate after all other provisions of the will or trust and all other expenses are satisfied
- ❖ A contingent bequest, in the event that primary beneficiaries predecease a donor

**Life Insurance:** Donors may make gifts of paid-in-full life insurance policies, or may name the endowment fund as a beneficiary of the policy.

**Retirement Assets:** Gifts of retirement plans, including Individual Retirement Accounts, 401(k) plans and 403(b) plans, can be made by naming the endowment fund as a part or full beneficiary, a contingent beneficiary or a remainder beneficiary.

For any gifts to the Pegasus Endowment Fund, we encourage you to work with your legal and financial advisors to provide assurance that you have made the best choice for both your current and deferred gifts—choices that will provide for your family as well as your charitable vision.

You may ask your advisors about other options, including:

- ❖ Charitable gift annuity
- ❖ Charitable remainder trust
- ❖ Charitable unitrust
- ❖ Charitable remainder annuity trust
- ❖ Retained life interest in real estate



# frequently asked questions

**Q: Why invest in a Pegasus endowment?**

A: Founded more than 40 years ago, Pegasus is an industry leader in equine-assisted activities and therapies. The effectiveness of our programs is well-recognized by our peers, health and human services professionals, and most importantly, our participant families. An endowed gift is a permanent legacy for the Pegasus mission, providing us with a lasting ability to serve people with special needs, individuals at risk and military veterans for decades to come.

**Q: Why now?**

A: Your gift instantly will be doubled through the generosity of the Arnhold Foundation, and your opportunity to positively impact our participants' lives will be twice as powerful.

**Q: How big is a typical endowment gift?**

A: Individual gifts and bequests to the Pegasus Endowment Fund will range from a recommended \$10,000 gift to \$1 million-plus, but gifts of any size will be gratefully appreciated.

**Q: What kinds of assets can I donate?**

A: There are many ways to make a charitable gift or bequest. You may designate: a specific cash amount; financial investments, such as stocks, bonds or certificates of deposit; a percentage of your estate or assets; a life insurance policy or retirement plan with Pegasus Therapeutic Riding as the beneficiary; something you own, such as art, jewelry or copyrights.

**For more frequently asked questions, visit [pegasustr.org/endowment](https://pegasustr.org/endowment).**



## How to Get Started

Our goal is to make it easy. We will answer your questions and ensure your philanthropic wish becomes a legacy.

**Contact Us:**

Amy Price  
Major Gifts and Endowment Officer  
Pegasus Therapeutic Riding, Inc.  
310 Peach Lake Road  
Brewster, NY 10509-1715  
Phone: 845-669-8235, ext. 102  
Email: [aprice@pegasustr.org](mailto:aprice@pegasustr.org)

**Additional Resources:**

[pegasustr.org/endowment](https://pegasustr.org/endowment)



our  
participants  
tell  
us

**Our programs offer them life-changing freedom:**

- ❖ of movement
- ❖ from judgment
- ❖ to explore their capabilities in a safe environment
- ❖ from limitations
- ❖ to work toward goals at their own pace
- ❖ to be themselves
- ❖ to communicate without words **and still be heard**



**P E G A S U S**

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