

As auto racing fans, we all love the thrill of watching cars race by at top speeds, hearing the engines roar and feeling the heat of intense competition on the track. | However, at times when our sport shows its more dangerous side, we all feel the loss to the racing community, as well. That's why the USAC Benevolent Foundation, along with the help of The Oxley Financial Advisory Group of Raymond James & Associates works to provide support to those most affected by racing's rare misfortunes. By bringing together fans, families and racing professionals alike, the foundation strengthens the efforts of an entire community and helps promote the recovery process.

The USAC Benevolent Foundation

The United States Auto Club (USAC) Benevolent Foundation is a nonprofit organization dedicated to helping individuals and families manage the challenges of coping with a serious auto racing accident. Whether it's overcoming a disability, regaining health or adjusting to the loss of a loved one, the USAC Benevolent Foundation offers financial, as well as emotional support in difficult times.

The Foundation takes its roots from the Wilbur Shaw Memorial Fund, established in 1954 following the death of three-time Indianapolis 500 winner and president of the Indianapolis Speedway, Wilbur Shaw. The fund, which initially assisted with medical or burial expenses of those harmed during American Automobile Association (AAA) racing events, was fully adopted by the USAC Benevolent Foundation in 1959.

For more information, please contact executive director Bill Marvel at



4910 West 16th Street, Speedway, IN 46224
606-787-0243 | Fax: 606-787-0242
marvel@kih.net

James Oxley, *Senior Vice President, Investments*
John Hickey, *Senior Vice President, Investments*
James Evans, *Associate Vice President, Investments*
Craig Reed, *Associate Vice President, Investments*



1499 Windhorst Way, Suite 200 | Greenwood, IN 46143
317-885-0114 | 800-382-9487 | Fax: 317-885-2609
craig.reed@raymondjames.com

© 2005 Raymond James & Associates, member New York Stock Exchange/SIPC #81710805 MS/JB

The USAC Benevolent Foundation and The Oxley Financial Advisory Group



Working Together Toward a Common Goal



The Power of Planned Giving

You may know someone whose life has been altered by a racing accident and could benefit from the support of his or her community. It could be a driver, race official or organizer, mechanic, or surviving family member of any of these individuals. A simple, generous act can make a positive impact on that person's life.

That's where planned giving can be a powerful tool to help you make a difference. When you make a gift to the USAC Benevolent Foundation, you help ensure appropriate funds can be available when the need arises – funds that can immediately start contributing to a person's or family's recovery.

At The Oxley Financial Advisory Group of Raymond James & Associates, we're here to offer financial guidance in your decision whether to donate, and to discuss how a planned gift can potentially help you make the most of that donation.

A Partnership for Enhanced Support

The Oxley Financial Advisory Group proudly supports the USAC Benevolent Foundation and regularly sponsors its charitable Women's Golf Tournament. We also provide financial advisory services to the Foundation's investment committee to help maximize the organization's use of funds. Recently, we've partnered with the Foundation to help educate potential donors on the variety of giving options available and how to select one that best suits their financial circumstances.

No Matter How You Make Your Gift, You Make a Difference

There are many ways to make a gift to the USAC Benevolent Foundation. Here we present several options that may be appropriate for you.

Donating Cash or Appreciated Securities

The donation of cash or appreciated securities is the simplest way you can give to the Foundation. If you wish to donate cash or appreciated securities, you may contact Bill Marvel at the USAC office directly, or contact us at The Oxley Financial Advisory Group and we'll be able to assist you.

Beneficiary Designation

Making a beneficiary designation allows you to make a planned gift to the Foundation and potentially enjoy future tax benefits. This can be accomplished by naming the USAC Benevolent Foundation as beneficiary of:

- An annuity contract,
- Employee-sponsored retirement plan,
- Life insurance policy,
- Traditional or Roth IRA, or
- Will or trust.

Other Planned Giving Alternatives

Raymond James offers several alternatives specifically designed to help you maximize your gift by providing charitable tax deductions, as well as opportunities to generate retirement income from assets that you donate. For example, the Raymond James Charitable Endowment Fund and Raymond James Pooled Income Funds are two exclusive planned giving vehicles that may be able to help you accomplish your philanthropic goals.

Other options exist, as well, such as working with your legal advisor and us to establish a Charitable Remainder Trust. Which option works best for you will depend on several factors, including your personal, financial and tax circumstances. As financial advisors with Raymond James, we can evaluate your situation and help you select a giving method that's right for you.

To learn more about how you can contribute to the lives of those who receive support from the USAC Benevolent Foundation, please feel free to contact the Foundation or us.

