Become an Esteemed Member of Shepherd's Center Legacy Society

Founded in 1998, Shepherd's Center of Northern Virginia (SCNOVA) is a volunteer-based non-profit organization dedicated to promoting and supporting purposeful, independent living for older adults through volunteer opportunities, free transportation assistance, support services, lifelong learning, and cultural enrichment opportunities. Over two hundred volunteers and a small staff, organizes and administers the activities of the Shepherd's Center.

Leave a Lasting Legacy in Your Community

You have an opportunity to invest in an organization dedicated to providing life enriching services to adults aged 50+ in our community. While we are supported by community organizations and businesses, grants and individuals, your participation in the SCNOVA Legacy Society will help sustain and enhance our community's most vulnerable and underserved populations.

A planned gift can take many forms. In addition to outright, tax-deductible cash gifts, there are other creative ways to give, including:

- Checks and Credit Card Donations
- Multiple Year Cash Pledge
- Bequest Through Will
- Outright Gift of Real Estate
- Retirement Accounts
- Stock Gifts
- Bonds and Mutual Fund Gifts
- Gifts of Life Insurance
- Personal Property Gifts
- In-Kind Gifts

In a recent survey, 97% of all transportation participants stated that the free volunteer rides are one of the reasons they are able to remain in their homes and in their community of choice – calling our volunteers "angels and the most wonderful people on Earth!"

Options for Planned Giving

Giving through your will or trust is a convenient way to leave a lasting legacy. By designating the **Shepherd's Center of Northern Virginia** as a beneficiary of your retirement plan or including a bequest in your will or trust, you create a memorial to remind future generations of your commitment to helping older adults remain independent and connected to our community. Also, a planned gift is a thoughtful way to put your assets to beneficial use after you and your loved ones no longer need them. A gift can be included in your will or trust, or it can be added by your attorney at any time. Your financial advisor or attorney can discuss your options to determine the best plan for you.

Bequests can take several forms. A **specific bequest** is a gift of something designated by the donor, such as:

- a specific amount of money, security, piece of real estate, or other asset (*suggested legal language: "I leave (dollar amount or asset) to the Shepherd's Center of Northern Virginia, 111 Church Street, NW, Suite 202, Vienna, VA 22180, Tax ID #54-1882048, to be used for general purposes."*)

- a percentage of an estate *(suggested legal language: "I give and bequeath to the Shepherd's Center of Northern Virginia, 111 Church Street, NW, Suite 202, Vienna, VA 22180, Tax ID #54-1882048, the sum of (__) percentage of the rest, residue and remainder of my estate to be used for general purposes.")*

- a residual bequest is made from what is left in an estate after all other bequests have been made (*suggested legal language: "All the rest, residue and remainder of my estate, real and personal, I give, devise and bequeath to the Shepherd's Center of Northern Virginia, 111 Church Street, NW, Suite 202, Vienna, VA 22180, Tax ID #54-1882048, to be used for general purposes.*)

- another option is to name the Shepherd's Center of Northern Virginia as a beneficiary of a retirement or life insurance policy.

We are honored to recognize your generosity and commitment by welcoming you as a valued member of our Legacy Society—whether publicly or anonymously. This lasting acknowledgment reflects the collective impact of Legacy Society members and serves as an inspiring example of dedication to supporting older adults in our community.

Joining the Shepherd's Center Legacy Society is simple: it begins with a promise. By including a bequest in your will or trust, you create a meaningful and lasting gift. This approach not only helps sustain our mission for years to come, but may also offer financial advantages, such as reducing estate taxes for your heirs. Most importantly, it allows you to pass on not just your assets, but your values—ensuring your legacy continues to make a difference for generations.

Shepherd's Center of Northern Virginia is a 501(c)(3) non-profit organization. Contributions are tax deductible to the extent permitted by law.

For more information, please contact Carolyn Pennington, Executive Director, at 703-281-5088 or carolynpennington@scnova.org.

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Legacy Gift Confirmation

Bequests, trusts and other forms of planned gifts help sustain the Shepherd's Center of Northern Virginia (SCNOVA) mission and programs for future generations of older adults. If you have named Shepherd's Center of Northern Virgina as a beneficiary in a will, trust, retirement plan, or other planned gift, we hope that you will share this good news with us. **All information is kept confidential.**

This legacy gift record will help us ensure that your wishes are fulfilled. It will also allow us to honor you as a member of the Shepherd's Center of Northern Virginia Legacy Society, which recognizes friends who have provided for the organization through their will or as the beneficiary of a planned gift.

This document does not bind you or your estate. By signing this form, you are simply acknowledging your current plans to benefit Shepherd's Center of Northern Virginia in the future. We recognize that gift plans may change over time and encourage you to notify us of changes. Your expression of support for the Shepherd's Center mission, programs and services is greatly appreciated.

Personal Information

_____

Name(s) Date(s) of Birth

_____

Address, City, State and Zip

_____

Phone Email

Gift Information

My gift will come through:

- ☐ Charitable Remainder Trust
- ☐ IRA or other retirement account
- ☐ Revocable "Living" Trust
- ☐ Donor Advised Fund
- ☐ Life Insurance Policy
- ☐ Will
- ☐ Other _____

To help plan for the future, the current estimated value of the planned gift is

$ _____ .

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Recognition

I/We wish to be recognized in the SCNOVA Annual Report and list of Legacy Society members in the following manner:

☐ List my/our name in all Legacy Society directories or other following manner:

_____

☐ Keep the gift anonymous and do not include my/our name in any Legacy Society directories.

Signature(s)

_____

Name Date

_____

Name Date

Return completed forms or direct questions to:

Carolyn Pennington, SCNOVA Executive Director
111 Church Street, NW, Suite 202
Vienna, VA 22180
703-218-0538 or carolynpennington@scnova.org