

Securing Tomorrow: A Guide to Planned Giving with Shepherd's Center

Welcome to the Shepherd Center's Planned Giving Program! Your commitment to supporting our mission ensures that we can continue making a positive impact for years to come. By considering planned giving, you have the opportunity to leave a lasting legacy while also receiving financial benefits. This guide provides a list of the various planned giving options available and how they can align with your philanthropic goals.



Why Planned Giving Matters:

Planned giving allows you to make a significant contribution to the Shepherd's Center while also providing financial advantages for you and your loved ones.

Benefits of Planned Giving:

In addition to leaving a lasting impact on Shepherd's Center, planned giving offers several benefits for donors:

- **Tax Advantages:** Planned gifts may provide tax deductions or reductions in estate taxes, allowing you to maximize the impact of your contribution.
- **Financial Security:** Planned giving options, such as charitable gift annuities and charitable remainder trusts, can provide you with a reliable income stream during retirement.
- **Legacy Preservation:** Planned giving allows you to create a meaningful, personal legacy that reflects your values and passions and that fosters advocacy among family and friends.

Types of Planned Giving:

There are several ways to incorporate the Shepherd's Center into your estate planning. Some common options:

- **Bequests:** By including Shepherd's Center in your will or living trust, you can designate a specific dollar amount, percentage of your estate, or specific assets to be donated.
- ***Donor Advised Funds:** Make contributions into a DAF, receive an immediate tax deduction, and recommend grants to the Shepherd's Center.
- ***Charitable Gift Annuities:** This option allows you to make a gift to Shepherd's Center and receive fixed payments for life. You'll enjoy a steady income stream while supporting our mission.
- ***Charitable Remainder Trusts:** With a charitable remainder trust, you can transfer assets to a trust that provides income to you or your loved ones for a specified period. Afterward, the remaining assets are distributed to Shepherd's Center.
- **Retirement Account Beneficiary Designations:** You can designate Shepherd's Center as a beneficiary of your retirement account, such as an IRA or 401(k). This allows you to support our work while minimizing taxes on your retirement assets.
- **Life Insurance Policies:** By naming Shepherd's Center as a partial beneficiary of your life insurance policy, you can make a significant gift without impacting your current financial situation.
- **Qualified Charitable Distributions** are tax-free transfers of funds from an individual's IRA directly to a qualified charity, available to individuals aged 70½ or older. QCDs count toward required minimum distributions but are not included in taxable income.

** The St. Louis Community Foundation is one of many local agencies that can help setup annuities, trusts and donor advised funds.*

How to Get Started:

If you're interested in incorporating Shepherd's Center into your estate planning, we recommend consulting with your financial advisor or estate planning attorney. They can help you explore the best options based on your financial situation and philanthropic goals.

Contact Us:

For more information about planned giving opportunities with Shepherd's Center, consult your financial advisor and/or call us at 314-395-0988

Thank you for considering planned giving with Shepherd's Center. Together, we can build a brighter future for generations to come.