

Some commonly asked questions about planned gifts.

**Q. Why should I designate a charity in my will?**

A. You can choose how you want to distribute your assets instead of someone else choosing for you. You'll also minimize attorney fees and court costs, and you'll avoid federal estate taxes.

**Q. Is it easy to add a charity to my will?**

A. Yes. All it takes is a short phone call to your lawyer to add a simple clause to your will.

**Q. Do I have to donate a specific dollar amount?**

A. We welcome gifts of any size.

**Q. Can I keep my gift private?**

A. Yes. If you prefer to join The Guardian Society at St. Mary's and remain anonymous, you will be invited to events but your name will not appear in print nor online.

**Q. Does my gift have to be cash?**

A. No. For example, you can give marketable securities, privately held stock, life insurance, personal property and real estate.

**Q. How can I support my favorite charity if I can't afford to make a gift this year?**

A. Leave the charity in your will. A bequest is a simple, powerful act that costs you nothing during your lifetime.

**Q. How can I make a gift to a charity in the future and receive additional income with fixed annual payments now?**

A. Explore a charitable gift annuity with your financial planner.



## St. Mary's Home

*Meeting the complex needs of children and adults with disabilities.*

6171 Kempsville Circle, Norfolk, VA 23502  
(757) 622-2208 • (800) 237-6555 • [saintmaryshome.org](http://saintmaryshome.org)



The GUARDIAN SOCIETY

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**Invest in their future.  
Leave your legacy.**



**St. Mary's Home**

## Create your own *legacy of care.*

St. Mary's Home in Norfolk is a special place full of love and laughter, where children and young adults from all across Virginia receive complex, professional, around-the-clock care in a nurturing, comfortable

environment to help them achieve their fullest potential.

Gifts made through estate plans to St. Mary's Foundation or through an endowment offer benefits to you and ensure that future

Mike and Sandy Duffy, Guardian Society founding members.

generations of children and young adults will benefit from the care at St. Mary's Home. If you plan for a future gift to St. Mary's Home, whether by will, trust, insurance or life income arrangement, we'd like to honor you with membership in a group of special people, The Guardian Society.

**How do you join?** It can be as simple as leaving St. Mary's in your will. To celebrate your decision to make a planned gift to St. Mary's, we will invite you to all St. Mary's events, plus special events just for Guardian Society members. Your name also will be included in our annual report, on our website and on the donor tree in our front lobby.

**If you make a planned gift to St. Mary's by the end of 2014, you will receive special recognition as a founding member of The Guardian Society.** Of course, you may prefer to join and remain anonymous.



## Please remember St. Mary's in your will.

A bequest, or gift to a charity placed in a will, is an act of love at no cost during your lifetime but one that will have tremendous impact on the future.

Ask your attorney to include the following sample language to make sure that your gift to St. Mary's is distributed as you intend. With respect to any planned gift, you should consult with your tax and estate planning advisors.



**If you make a general or specific bequest allowing an amount of money, or a percentage of your estate, to be given, please include the following language:**

"I give, devise and bequeath to St. Mary's Home for Disabled Children Foundation, Inc. the sum of \$ \_\_\_\_\_ (or describe the real or personal property)."

**If you decide to leave the remainder of your estate to St. Mary's Home for Disabled Children Foundation, Inc. once all specific bequests have been made, you would include the following language:**

"I give, devise and bequeath St. Mary's Home for Disabled Children Foundation, Inc. all (or \_\_\_ %) of the rest, residue and remainder of my estate."

**If you make a contingent bequest indicating St. Mary's Home for Disabled Children Foundation, Inc. will receive a distribution from your estate only if one or more of your named beneficiaries does not survive you, then include the following language:**

"I give the residue of my estate to my brother, (John). If my brother, (John), does not survive me, I give the residue of my estate to St. Mary's Home for Disabled Children Foundation, Inc."

## Are you ready to become a founding member of The Guardian Society at St. Mary's Home? Thank you.

To let us know about your planned gift, or to receive more information about planned gifts, please fill out this short form and return in the envelope provided. Or contact Martha Price Stewart, director of development, at [mstewart@smhdc.org](mailto:mstewart@smhdc.org), (757) 446-6797 or (800) 237-6555.

Name(s) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone (H) \_\_\_\_\_  
 Phone (W) \_\_\_\_\_  
 Phone (C) \_\_\_\_\_  
 Email \_\_\_\_\_

Please describe your estate gift to St. Mary's (all information will be kept confidential):

For recognition \_\_\_\_\_  
 Anonymous

Please send information regarding planned gifts to St. Mary's Home.  
 Bequests  
 Gifts that pay you lifetime income  
 Gifts with retirement assets  
 Endowment opportunities  
 Other \_\_\_\_\_

**RETURN TO:**  
 Martha Price Stewart  
 Director of Development  
 St. Mary's Home  
 6171 Kempsville Circle  
 Norfolk, VA 23502

St. Mary's Home for Disabled Children Foundation, Inc. is a 501 (c) 3 non-profit organization, federal I.D. number 54-1868069. A copy of our IRS Form 990 is available by calling (757) 622-2208 or (800) 237-6555. St. Mary's Home is registered through the Division of Consumer Affairs at the Virginia Department of Agriculture and Consumer Services.

