

Shepherd's Table Celebrates its 40th year in 2023: We Invite You to be a Part of Our Legacy for Years to Come

You, our most important sustaining donors, are invited to leave a legacy to Shepherd's Table to ensure that the people we serve can depend on us for years ahead. Planned giving is one opportunity to shape your legacy and can be as simple or as sophisticated as you wish.

Although not required, Shepherd's Table appreciates being advised if included in your estate planning, so we may thank you and extend you a membership in our Table Legacy Circle. Your participation in the Table Legacy Circle ensures that Shepherd's Table will continue to serve the community for years to come. The Table Legacy Circle honors those who share our commitment to providing meals and help to those who need it most.

As a member of the Table Legacy Circle, you will have access to special events and teleconferences. You will also receive updates on our programs through our development team and executive director.

These are several options for including Shepherd's Table in your estate plan:

- **Bequest** – a gift of personal property through a will or living trust – may be made in any amount and may be unrestricted or designated for a specific program or purpose.
- **Retirement Plan Beneficiary Designation** – If you designate Shepherd's Table as your beneficiary, a qualified retirement plan such as an IRA, 401(k), 403(b), Keogh plan or pension assets designated for Shepherd's table would pass tax-free at the time of your death. You would not have to revise your will, but simply complete a beneficiary designation form and submit it to your retirement plan administrator.
- **Life Insurance** – Options for charitable giving include (a.) donating a life insurance policy to Shepherd's Table now and taking a tax deduction for the policy's cash value; or (b.) naming Shepherd's Table as a beneficiary or contingent beneficiary of your life insurance policy.

Sample language for including Shepherd's Table in your will:

- I give, devise and bequeath to Shepherd's Table the sum of _____ dollars (\$_____), to support Shepherd's Table general purposes (or for a special project of your choosing).
- I give, devise and bequeath to Shepherd's Table _____ percent of my adjusted gross estate as finally determined for federal estate tax purposes, to support Shepherd's Table general purposes (or for a special project of your choosing).
- *(If you wish to make a **contingent bequest**)* If the above-named beneficiaries should predecease me, then I give their share of my estate to Shepherd's Table.

Shepherd's Table is a non-profit charitable organization whose current mailing address is 8106 Georgia Avenue, Silver Spring, Maryland 20910 and whose Federal Taxpayer Identification Number is 52-1381738. It is helpful to include this information in your bequest.

This material is not offered as legal or tax advice and is intended solely for informational purposes to inform you about charitable giving options. Individual circumstances will vary. Please consult your attorney, financial planner and/or tax advisor for advice about your intended donation to Shepherd's Table.

Legacy Donor and Community Leader: George Neighbors Silver Spring, MD

George Neighbors, former Chair of Shepherd's Table Board of Directors, set an example for planned giving by including Shepherd's Table in his estate plans. As he considered his own legacy, George concluded that a bequest from his estate would reflect his values and priorities by providing Shepherd's Table the means to continue its services for years to come.

As George considered how he wanted his material assets to be distributed after his death, he concluded that Shepherd's Table could benefit and positively impact the most people with the greatest need. This would be his legacy: to serve the needy, inspire others to give and support the good work of Shepherd's Table.

Not surprised with his decision, George's family fully supports his donation and understands he can modify his will as needed to reflect any changed circumstances. George decided to make these arrangements now to ensure his estate will be distributed in a way that honors his values and priorities.

Your Own Legacy

Will you consider including Shepherd's Table in your estate plans? Naming Shepherd's Table as a beneficiary of your will, life insurance policy, 401(k) or other retirement plan is an easy way to make a lasting commitment to meeting needs in our community.

Benefits of a bequest:

- Donors can leave a legacy for themselves, their families and make a lasting impact.
- May enable a larger gift than thought possible.
- Easily modified if needs change.
- Fulfills a commitment to provide for those in need here in the community.

Kindly let us know if you have included Shepherd's Table in your estate plans. Reach out to Daniella Burgos, Director of Development and Communications, atdburgos@shepherdstable.org or by phone at 301-585-6463 X205.