

Legacy Gifts

These gifts ensure future generations will benefit from your generosity and legacy.

Bequest: You can designate a specific dollar amount or a percentage of your estate to Shepherds College in your will or trust.

If you make annual gifts and wish to continue support after your lifetime, you can arrange an endowed gift through a Donor-Advised Fund or your trust.

Life Insurance and/or other Retirement

Assets: You can name Shepherds College as the beneficiary of a life insurance policy or retirement account (i.e. IRA, 401k, etc.).

Benefits of Legacy Gifts

- Distribute your assets according to your wishes
- Save on estate taxes with proper planning

Please contact us if you plan to include us in your estate and/or as a beneficiary so we may thank you for your forever gift of Christian love.

Important bequest information:

Shepherds College
1805 15th Avenue
Union Grove, WI 53182
Tax ID # 39-0988997

Contact us with any questions:

262.878.5620

www.shepherdscollege.edu

advancement@shepherdscollege.edu

“The earth is the Lord’s, and everything in it; the world, and all who live in it.”

Psalm 24:1

MISSION

Shepherds College exists to educate and train students with intellectual and developmental disabilities by equipping them to reach *Appropriate Independence™* through the development of vocational, social, and life skills while inspiring a lasting awareness of God’s plan for their lives.

“I give to Shepherds College because I have a strong desire to see the school expand to reach many others with the programs they offer.”

Bill Ballou, donor

We are proud to partner with National Christian Foundation Wisconsin to help you give in tax-smart ways. Please contact them at 262.796.9910 or www.ncfgiving.com/Wisconsin to explore any of these unique charitable giving opportunities.

Shepherds College reserves the right to refuse any gift that it believes is not in the best interests of Shepherds College, the donor, and/or the communities served by Shepherds College.



YOUR GUIDE TO Planned Giving

Giving today to advance the mission of Shepherds College for tomorrow





Why a Planned Gift?

Planned, or deferred, gifts provide creative and flexible strategies for your estate and charitable planning. Some planned gifts provide income, and many of them reduce your taxes.

The greatest benefit, however, lies in knowing you are supporting the mission and ministry of Shepherds College as a reflection of your Christian faith and out of gratitude for God's many blessings.

“It is inspirational to see how God has used this college to help these students fulfill unbelievable roles in our society. I am honored to be able to invest in such a reliable, proven school.”

Ralph Poulson, donor

Gifts That Pay Income

With careful planning, you can provide yourself or someone else annual income while providing meaningful support to Shepherds College.

Charitable Gift Annuity:

In exchange for a gift of cash, stocks or other assets, by contract, you or a loved one receive fixed income at an attractive rate of return. A portion of the gift will benefit Shepherds College.

Charitable Remainder Trust:

You contribute assets to an irrevocable trust. These assets are invested by you, and you, or a loved one, receive income from the trust. The remaining assets benefit Shepherds College.

Benefits of Income-Producing Gifts

- Receive income payments
- Obtain a charitable deduction for a portion of the value of the gift
- Save on capital gains taxes when you contribute appreciated securities
- Convert low- or non-income assets into a gift with an attractive income stream

“But since you excel in everything—in faith, in speech, in knowledge, in complete earnestness and in the love we have kindled in you—see that you also excel in this grace of giving.”

2 Corinthians 8:7

Gifts During Lifetime

You can maximize Kingdom impact, save taxes and experience the joy of generosity.

Outright: In addition to cash, you can make an outright gift of real estate, a paid-up life insurance policy or other property of value directly to Shepherds College.

Stock: If you currently write checks to support Shepherds College, but also have appreciated stocks or mutual funds, you can significantly reduce the cost of your charitable gift while giving more by gifting stock before the sale.

Charitable IRA Rollover: If you are over 70 ½, you can make a tax-free distribution from your IRA directly to Shepherds College.

Donor-Advised Fund: Instead of writing checks directly to Shepherds College, you can manage ALL of your charitable giving with a Donor-Advised Fund – which works like a charitable checking account. You give assets into the Fund (cash, stocks, real estate, etc.), receive an immediate income tax deduction, and then recommend grants to your church and Shepherds College when timely. This is a great tool for windfalls, inheritances and year-end business profits.

Benefits of Lifetime Gifts

- Receive an immediate tax deduction
- Save on income, capital gain, gift, and/or estate taxes
- Experience the joy of the gift being put to good use during your lifetime