Planned Giving
Leave a lasting impact!

ShelterCare provides compassionate housing and behavioral health services for individuals and families wanting a safe and stable home in our community.

Contact Us
ShelterCare
499 West 4th Ave.
Eugene, OR 97401
(541)686-1262
development@sheltercare.org

The ShelterCare Foundation is an endowment fund, professionally managed by the Oregon Community Foundation, which provides much-needed support—in perpetuity—for ShelterCare programs. The ShelterCare Foundation is a 501(c)3 nonprofit corporation, independent of ShelterCare and governed by a volunteer board of directors. Grants from the endowment are requested by the ShelterCare board and approved by the Foundation board. Oregon Community Foundation rules limit the annual distribution to a specified percentage of the endowment principal, ensuring that funding will continue to be available as long as ShelterCare remains in operation.

Please mark your donation as a designation to the ShelterCare Foundation.

ShelterCare eIN: 23-7115003
Make a Legacy Gift!

**CHARITABLE GIFT ANNUITIES**

This is a gift that can give a donor tax benefits and guaranteed income while providing the ShelterCare Foundation a generous donation. A charitable gift annuity is a simple contract between a charity and a donor. In return for a donation of cash or other assets (highly appreciated stock is a common choice), the Oregon Community Foundation will provide you or someone designated by you a fixed annual payment for life. Charitable gift annuities are provided through the Oregon Community Foundation but no fee will be charged; minimum gift is $25,000.

**LIFE INSURANCE**

Donors can name the ShelterCare Foundation as a beneficiary of their life insurance policies (a decision that is revocable) or transfer ownership of a life insurance policy to the ShelterCare Foundation. Ownership transfer is irrevocable, but donors can claim an income tax deduction for the policy’s cost basis or surrender value (whichever is less) and any subsequent premium payments will be tax deductible.

**CHARITABLE REMAINDER TRUSTS**

This is another income-producing gift that can provide both tax advantages for the donor and long-term benefits for the ShelterCare Foundation. Donors make an irrevocable transfer of cash, securities or other appreciated property into a trust, which then makes a specified annual cash distribution to one or more beneficiaries (usually including the donor) for life or a specified term of years. At the end of the term, at least 50 percent of the remaining money must be paid to the ShelterCare Foundation to be added to the endowment at Oregon Community Foundation. Oregon Community Foundation must serve as trustee (at no cost to the donor at this time) and the minimum gift is $100,000. Some administrative fees will be charged for the services provided.

Please seek professional advice with your legacy giving and estate planning questions.

**SIMPLE BEQUESTS**

A bequest is made through a donor’s will or living trust. Bequests are easy to establish and fully revocable if your plans change. Donors who leave a bequest to the ShelterCare Foundation can take an estate tax deduction of 100 percent of the gift’s value. You can state your bequest as a set amount of cash, securities or other assets; as a percentage of your estate; or as the “residue” or “percentage of the residue” of your estate, gifted after the other terms of your will have been satisfied.

**APPRECIATED SECURITIES**

Shares of appreciated stock or mutual funds can be gifted to the ShelterCare Foundation and sold without the donor incurring capital gains taxes.

**IRA DISTRIBUTION**

Donors can designate the ShelterCare Foundation as the beneficiary of their individual retirement account distributions. Any IRA account with the ShelterCare Foundation listed as the beneficiary will be free of estate and income taxes.