



ENRICHMENT

Today.

SUSTAINABILITY

Tomorrow.

*Ways you can help SVWC today
and secure SVWC for tomorrow.*



SVWC Foundation

FULFILLING OUR *Mission.*

At Shenandoah Valley Westminster-Canterbury (SVWC), our mission is what guides our passion for excellent resident service and care. Since its inception in 2015, we've witnessed firsthand the impact that the SVWC Foundation has had on the lives of residents and their families. We would love to invite you to get involved in the exciting opportunity to support the SVWC Foundation.

SVWC Foundation AREAS OF

Support.

FELLOWSHIP FUND

Shenandoah Valley Westminster-Canterbury (SVWC) seeks to alleviate economic uncertainty for our residents by offering a lifetime of security for all. The Fellowship Fund was established to provide confidential financial assistance to qualified residents who, despite careful planning and saving, find themselves in need of support. The Fellowship Fund allows a person to continue living at SVWC in dignity and with grace, regardless of their financial situation. Our goal is to provide a safety net for all residents, so that no member of our community will ever be forced to relocate due to a lack of resources.

FUNDS LIST

While the Fellowship Fund remains the priority and the flagship mission of the Foundation, there are several additional opportunities for philanthropy. Our mission includes seeking support for a number of different funds, as listed on pages 3 and 4.



“Mom managed the Great Depression and prospered but found few controls for escalating prescription drug costs and a downturned financial world. The generosity of Westminster-Canterbury’s Fellowship Fund allowed me to assure her, during the most fragile time of her life, that all was well.”

**FAMILY MEMBER OF
A FELLOWSHIP FUND
RECIPIENT**



SVWC Foundation FUNDS

List.



CAPITAL IMPROVEMENT

Capital projects that are not budgeted for can be funded in other ways. (e.g., Putting green, croquet court)

CHAPEL

Originally established to build the chapel. The fund is now used to purchase equipment, furniture, and religious pieces to enhance the use of the chapel.

CHAPLAINCY

Established in 2003 for items that could not be purchased in the chaplaincy budget. (e.g., Books for a special bible study)

MEMORY SUPPORT

Supports SVWC efforts for residents that benefit from memory support programs and activities. (e.g., Sensory items/activities and training)

EMPLOYEE EMERGENCY

It is used by employees who experience hardship and have exhausted all other areas of assistance. All transactions are confidential, and the money is paid to a third party, such as a landlord, doctor, or utility company. (e.g., House fire/flood, car repair, a spouse loses a job, choosing between utilities or medications)

HELEN ABRAHAMSEN EMPLOYEE SCHOLARSHIP

Scholarships are offered to employees and their dependents to further education. (Paid directly to Universities/Colleges)

FELLOWSHIP

Established to provide confidential financial assistance to qualified residents who, despite careful planning and saving, find themselves in need of support.

FOUNDATION (UNRESTRICTED)

Used where the funds are needed most (e.g., Employee COVID bonus)

GIFT-IN-KIND

This can be furniture, artwork, or décor that can be displayed and utilized by Westminster-Canterbury.

LIBRARY

Used to purchase books, newspapers, and supplies needed to manage the library. An endowment was created that purchases and restores books.

**LYNN SHEAROUSE
CULTURAL ARTS:
ART PROGRAM**

Enhances the current art program. (e.g., Adaptive equipment, specialized art class, or program/materials)

**LYNN SHEAROUSE
CULTURAL ARTS:
HORTICULTURE THERAPY**

Augment the horticulture therapy program. (e.g., Vegetables, and floral plants for horticulture programming)

**LYNN SHEAROUSE
CULTURAL ARTS:
MUSIC THERAPY**

Enhances the current art program. (e.g., Adaptive equipment, specialized art class, or program/materials)

MOTHER NATURE TEAM

Helps residents further enjoy and preserve the natural environment. (e.g., Bird feeder project, purchases of plants, trees, benches)

**NURSING HEALTHCARE
EQUIPMENT**

Established for needed healthcare equipment purchases to assist nursing staff in assisted living, skilled nursing, memory care, and therapy that are not included in the current year's budget.

NURSING SCHOLARSHIP

Scholarships for SVWC employees to pursue healthcare studies include tuition, books, conferences to obtain continuing education credits, travel, etc.

WOODWORKING

Gifts made for, or in honor of, and repairs or construction done by the woodworking shop team. The Woodworking shop donates proceeds to the Fellowship Fund bi-annually.

SVWC Foundation

GIFTS FOR

Today.

CASH GIFTS

SVWC Foundation accepts gifts given in cash, check, credit card, online giving on our website at svwc.org/give, or through recurring gifts. Credit card gifts can be made securely online at svwc.org/give.

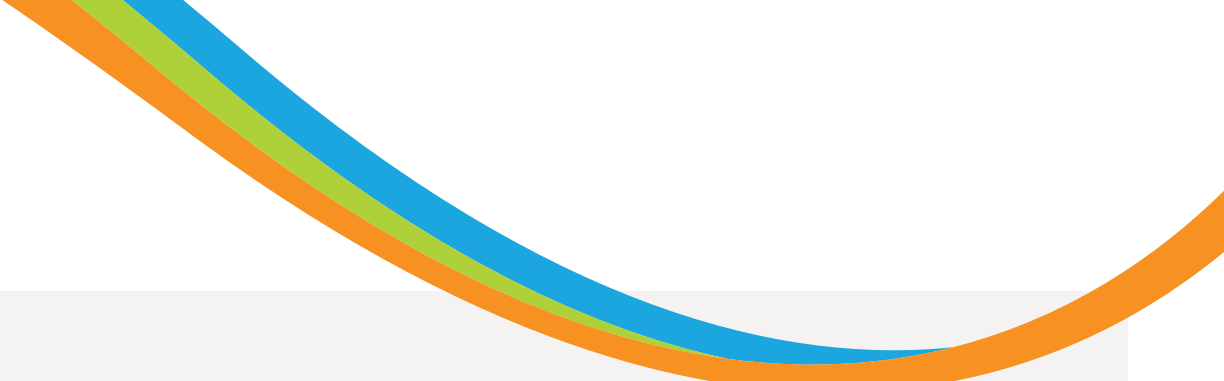
MATCHING GIFTS

Many businesses have a matching gift program for employees and retired employees. Your charitable contribution to the SVWC Foundation may be matched by your current or previous employer. They provide the documentation for you to complete and submit with your gift. Your matching gift is then sent to the SVWC Foundation, for which you will receive a notification.

APPRECIATED SECURITIES: STOCKS, BONDS, MUTUAL FUNDS

Gifts of stocks, bonds, and mutual funds is a process of transferring financial assets to a charitable organization such as SVWC. This is a popular way to support SVWC while potentially receiving significant tax benefits.





GIFTS FROM YOUR IRA

Benefits of an IRA-Qualified Charitable Distribution

- Allows individuals 70 ½ or older to transfer up to \$100,000 annually from an IRA directly to a qualified charity.
- Satisfies your required minimum distribution (RMD) for the year.
- Reduces your taxable income, even if you do not itemize deductions. You pay no taxes on the transfer.

How an IRA-Qualified Charitable Distribution Works

- Reach out to your IRA plan administrator or account custodian to make a gift from your IRA to SVWC (not the Foundation for this particular giving vehicle). Your IRA funds will then be directly transferred to the Foundation to help continue our important work.
- You may designate your gift to the fund of your choice. Please contact the Foundation Office for a complete list.
- To benefit in the current year, complete your Qualified Charitable Distribution (QCD) gift before December 31. Do allow a few weeks for your financial planner to process.

DONOR ADVISED FUNDS

If you have a Donor Advised Fund (DAF), you can direct the holder of your fund to make a gift to support SVWC's mission without additionally affecting your financial position.

REAL ESTATE

SVWC may accept gifts of real estate, such as personal residences, vacation homes, commercial and rental properties, and undeveloped land. You can receive a charitable income tax deduction for the full fair market value of the property and avoid capital gains tax on any appreciation. Your transfer of property to SVWC will also remove the burden and expense of managing and selling your property.

RETAINED LIFE ESTATE

You can donate your home or farm to SVWC and continue to live there for your lifetime or a term of years. Since your gift cannot be revoked, you will receive a federal income tax deduction for a portion of the home's value in the year the gift is made, and the property is removed from your estate for tax purposes. This gift may be a primary residence, vacation home, or other structure the donor uses as a residence. A farm can include raw farmland, as well as farmland with buildings on it. You will continue to pay real estate taxes and insurance on the property as well as provide for maintenance. SVWC may keep or sell the property.

CHARITABLE GIFT ANNUITY

Charitable gift annuities are a planned-giving arrangement between you and SVWC. You make a gift to SVWC, which invests the gift and pays you a fixed income for life based on age, life expectancy, and number of beneficiaries (one life or two life). SVWC receives the remaining assets upon the death of the donor.

CHARITABLE LEAD TRUST

A lead trust supports SVWC today while allowing you to include your family in your long-term estate plans. Lead trust payments are made over a designated period, traditionally 15 to 25 years. Once the trust ends, the remainder of the assets are paid to you or designated beneficiaries.



SVWC Foundation

GIFTS FOR

Tomorrow.



Deferred gifts ensure future generations will benefit from your generosity and legacy. We would like to recognize you in our Legacy Society. Please share your deferred gifts with us!

BEQUESTS

A bequest is a transfer of cash, securities, or other assets made through your will or living trust and can be made for a specific amount, percentage of your estate, or a particular asset. Like other gifts, bequests can be unrestricted in purpose or designated to a specific fund. Please contact us to discuss your wishes. A will can be changed at any time with an amendment, which means the donor does not have to rewrite their entire will. SVWC welcomes bequests of all sizes.

Bequest Language to use in your Will or Trust

We recommend the following language when designating SVWC in your will or trust.

I bequeath to Shenandoah Valley Westminster-Canterbury

- a) all of the residue of my estate,
- b) an amount equal to X percent of the residue of my estate thereof,
- c) \$_____ (a designated amount) to the Shenandoah Valley Westminster-Canterbury Foundation, a nonprofit located in Winchester, Virginia, for its general and charitable purposes. SVWC Foundation's tax ID number (EIN) is 47-4751000.

Designating your Bequest:

General bequest language

"I give, devise, and bequeath to the SVWC Foundation in Winchester, Virginia, the sum of \$_____ (or a description of the specific asset), for the benefit of SVWC and its general purposes."

Residuary bequest language

Residuary bequests are made when you intend to leave the residue portion of your assets after other terms of the will have been satisfied.

"All the rest, residue, and remainder of my estate, both real and personal, I give to Shenandoah Valley Westminster-Canterbury Foundation in Winchester, Virginia, for its general purposes."

Contingency bequest language

Contingency bequests allow you to leave a portion of your estate to a particular charity if your named beneficiary does not survive you.

"I devise and bequeath the residue of the property, real and personal and wherever situated, owned by me at my death, to (name of beneficiary), if (she/he) survives me. If (name of beneficiary) does not survive me, I devise and bequeath my residuary estate to Shenandoah Valley Westminster-Canterbury in Winchester, Virginia, for its general purposes."

For a complete list of established funds, contact the Foundation Office at ext. 2915.

BENEFICIARY OF ACCOUNTS INCLUDING RETIREMENT PLANS AND LIFE INSURANCE

You can designate SVWC Foundation as a beneficiary of a retirement account, an investment or bank account, or your life insurance policy by completing a beneficiary designation form with your broker, banker, or agent. In planning your estate, consider leaving SVWC Foundation your retirement plan assets while leaving more favorably taxed assets to your family. Retirement accounts such as IRAs, 401(k), and 403(b) plans can be subject to double taxation – ordinary income tax and estate tax – meaning that more than 60 percent can go to taxes if left to your heirs. Retirement plan assets left to the SVWC Foundation will transfer tax-free. No will is necessary. You can even list the SVWC Foundation as a contingent beneficiary. The SVWC Foundation welcomes beneficiary gifts of all sizes.

HONOR/MEMORIAL GIFTS

SVWC Foundation will acknowledge all gifts that are given in honor of or in memorial of a loved one by notating the tribute with the gift and notifying the designated family member. For more information, please contact the Foundation Office.

We encourage you to discuss your intentions with your legal and financial adviser before making a gift. This information is intended to provide general gift planning information and is not intended to provide specific legal, tax, or investment advice. We respect your privacy. Your information will always be kept confidential.



For more information, please contact Sherry Hudson, Director, Foundation and Marketing, at shudson@svwc.org or 540-665-5923.



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GUIDELINES FOR ACCEPTANCE: SVWC reserves the right to decline certain types of gifts or donated properties based on the Gift Acceptance Policy. The SVWC CEO/President, SVWC CFO, and Director of the SVWC Foundation are responsible for the review and acceptance of all gifts needing approval. SVWC may seek the advice of legal counsel in matters relating to acceptance of gifts when appropriate.