

## SPECIAL INVITATION: JOIN THE BERNIE SMITH LEGACY SOCIETY



The Bernie Smith Legacy Society recognizes the exceptional dedication of individuals who include Community Servings in their estate plans. Your planned gift will create a lasting legacy of care, extending your generosity well beyond your lifetime and ensuring our mission—to provide medically tailored meals to people living with chronic illnesses and other conditions—can continue for years to come.

### GIFTS DURING YOUR LIFETIME



**Charitable Gift Annuities:** This is a simple contractual arrangement to benefit Community Servings that produces an annual fixed income for you at a rate determined by your age at the time the gift is made.



**Charitable Trusts:** Charitable Lead Trusts and Charitable Remainder Trusts offer ways to provide for yourself and your loved ones during your lifetime, lower your taxable estate, and support Community Servings.



**Gifts of Non-Cash Assets:** You might be able to make a larger gift—and a much more significant impact on the people we serve—than you might think. A gift of an asset, such as stocks, IRA Qualified Charitable Distributions (QCDs), donor advised funds (DAFs), real estate, artwork, or other property can be a more tax-efficient way to make a gift than cash. Oftentimes, appreciated assets can be converted to income-producing gifts like charitable gift annuities or charitable trusts. We would be pleased to discuss the possibilities and benefits of such gifts with you and your advisors.

### GIFTS AFTER YOUR LIFETIME



**Bequests:** Including Community Servings in your will or trust allows our meals to continue without you sacrificing any of your assets while you might need them. Adding a bequest to your will is easy and can be done with a single sentence: “I give and devise to Community Servings, or its successor, federal tax identification number 22-3154028, currently located at 179 Amory Street, Jamaica Plain, MA 02130, (written amount or percentage of the estate or a description of the property).”



**Beneficiary Designations:** You can name Community Servings as a beneficiary of a retirement plan or account—for example, your IRA, 401(k), or 403(b)—or a life insurance policy, a donor advised fund (DAF), or other financial account. These designations can be tax-efficient ways to make a lasting impact. Simply request a beneficiary designation form from your plan administrator and name Community Servings as a sole, partial, or contingent beneficiary.



**Life Insurance:** Naming Community Servings as the owner and irrevocable beneficiary of your life insurance policy might allow you to claim an immediate income tax deduction. We would be pleased to discuss the possibilities and benefits of such gifts with you and your advisors.

**A Legacy of Gratitude:** As a client who received medically tailored meals, Bernie Smith understood the strong connection between healthy food and managing illness. To bring our vital services to more people, he made the first planned gift to Community Servings, which we received upon his passing.

*To learn more, contact Luis Fortes, Senior Major & Planned Giving Officer at Community Servings, at 617-522-7777 x290 or [lfortes@servings.org](mailto:lfortes@servings.org)*

# Commitment Form: Including Community Servings in My Estate



Name \_\_\_\_\_

Spouse \_\_\_\_\_

Mailing address \_\_\_\_\_

Telephone \_\_\_\_\_ Email \_\_\_\_\_

Date of birth \_\_\_\_\_ Spouse date of birth \_\_\_\_\_

I/we have named Community Servings as a beneficiary of one or more of the following:

- ☐ Will/Living Trust for ☐ (specified amount); ☐ (a percentage); ☐ (a residual amount)
- ☐ IRA or Retirement Plan for ☐ (specified amount); ☐ (a percentage); ☐ (a residual amount)
- ☐ Life Insurance Policy ☐ (specified amount); ☐ (a percentage); ☐ (a residual amount)
- ☐ Donor Advised Fund ☐ (specified amount); ☐ (a percentage); ☐ (a residual amount)
- ☐ Other (please specify) \_\_\_\_\_

At this time, I/we estimate that the estate gift will have a value of approximately \$ \_\_\_\_\_

My/Our gift is:

- ☐ For area of greatest need ☐ Designated for \_\_\_\_\_
- ☐ Please contact me to discuss options.

Will Community Servings receive your gift only if someone else should pass away before you?

- ☐ No
- ☐ Yes — Please provide details \_\_\_\_\_

The contact information of my/our estate counsel, executor or administrator is as follows:

\_\_\_\_\_

## The Bernie Smith Legacy Society recognition:

- ☐ I/We may be included in a published list of The Bernie Smith Legacy Society members (gift details are not included) and listed as:  
\_\_\_\_\_
- ☐ I/We prefer to remain anonymous.

Donor Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_