

Documenting Your Estate Gift

Frequently Asked Questions

1. Why should I document my planned gift with VMAPA?

- Documentation allows us to thank you for your generosity and to invite you to share the story and motivation behind your planned gift with its future recipients, if you so desire.
- Documentation provides us with additional instructions for how you want your planned gift to be used.
- Documentation enables us to honor you with induction into the Legacy Society, our giving society for those who have made planned gifts to VMAPA. Jennifer Bauman hosts an exclusive in-person event each year to welcome new members of the society and to visit with existing members. Upon induction, you will be invited to attend these gatherings and to enjoy other VMAPA opportunities.

2. I have already included VMAPA, in my will/trust/retirement account beneficiary designation. Why might additional instructions be needed?

- Most retirement accounts do not allow for beneficiary designations beyond the legal entity itself. On the other hand, our short and easy Statement of Intent allows you to indicate that, for example, your gift should go to scholarships rather than our endowment. This specificity ensures that your vision for your gift is fully realized.
- Documentation allows us to confirm that the correct legal entity is listed in your plans. It also gives you an opportunity to execute a scholarship agreement (outlining the selection criteria for your scholarship's recipients) now rather than leaving it up to your executor. Note: If your plans call for a scholarship to be established, you must either execute a scholarship agreement during your lifetime or have an executor do it after your passing for that scholarship to be established at VMAPA.

3. I understand that there is value in documenting my planned gift with VMAPA, but I wish to remain anonymous and/or don't want to receive additional calls, emails, requests for annual gifts, etc., after my gift is made.

- We offer a way for you to document your gift anonymously, thus ensuring that we have all of the information we need on file without revealing any of your personal details. Whether you document your gift anonymously or not, though, your documentation information is not accessible by anyone outside of VMAPA's Department of Philanthropy.
- Our first and highest way of thanking you for your gift to VMAPA is by respecting your wishes. If you prefer to not be contacted by us following the documentation process, we will make a note in our records and honor your decision.

4. OK, I'm convinced. How do I document my plans with VMAPA?

- To document your gift to VMAPA, please reach out to Jennifer Bauman, Chief Advancement Officer at 408-727-5532 Opt 4 or jbauman@scvanguard.org
- Thank you for helping us ensure your gift is used as you intended!