

Proposed text for Planned Giving Brochure & base for website

<<Cover>>

**Mountain Shadows Foundation
Legacy Society
Because I CARE**

The Mountain Shadows family of nonprofit organizations provides care and services to persons with intellectual disabilities in the communities of San Diego and Riverside.

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About Mountain Shadows

Mountain Shadows Support Group (MSSG) provides care and support in secure, family home environments to 171 individuals where we foster enriching relationships, independence and personal growth. These 27 residential community homes are located in Escondido, San Marcos and Riverside.

Mountain Shadows Ancillary Services (MSAS) provides services in adult day programs and the community to over 180 individuals by promoting enhanced experiences including community integration, mobility training, independent living skills, volunteer opportunities, respite care and transportation.

The legacy of MSSG and MSAS continues today in the “Because I Care” culture that reflects an enduring promise to our residents, participants, families and employees.

Mountain Shadows Foundation (MSF) is the charitable fundraising organization supporting MSSG and MSAS which is dedicated to advancing their programs and services through community philanthropic support.

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Join the Legacy

Mountain Shadows Legacy Society is a special group of individuals who are committed to ensuring Mountain Shadows will continue to provide uncompromised care to individuals with intellectual disabilities for generations to come.

You can become a member of Mountain Shadows Legacy Society with your estate or deferred gift commitment to Mountain Shadows Foundation. In recognition of your generosity you will receive:

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Exclusive members only event

VIP invitations to all Mountain Shadows special events

Attendance to the annual banquet at the Fall Classic

Recognition on our website and any other materials which recognize Legacy Society members

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Here are some ways you can leave a lasting impact at Mountain Shadows:

Wills or Living Trust

In as little as one sentence you can declare Mountain Shadows Foundation a beneficiary in your will or living trust, thus helping those who can't help themselves for years to come. If your life circumstances change you have flexibility to adjust the amount or percentage you choose to leave Mountain Shadows.

Beneficiary Designations

Not everyone wants to commit to making a gift in their will or estate. Some prefer the increased flexibility that a beneficiary designation provides by using: IRAs and retirement plans; life insurance policies and commercial annuities. Simply contact your retirement plan administrator, insurance company or financial institution for a beneficiary form. Decide what percentage you would like Mountain Shadows Foundation to receive and name us, along with the percentage you choose, on the beneficiary form.

Return the completed form to your plan administrator, insurance company, bank or financial institution.

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Special Needs Trust Remainder

A third-party Special Needs Trust (SNT) provides support to your loved one with disabilities without jeopardizing their public support. You can choose to create an individual trust or join a pooled trust like that available through the Special Needs Trust Foundation (SNTF). The SNTF's pooled trust provides increased investment leverage, gives families with smaller amounts of money access to the SNT solution, and offers services that promote fiscal management through a respected San Diego nonprofit.

The remaining balance of the SNT account at the time of your loved one's death will be distributed per your instructions. To ensure the legacy of you and your loved one at Mountain Shadows, name Mountain Shadows Foundation as a beneficiary.

See Your Generosity in Action

IRA Charitable Rollover

If you are 70½ years old or older, you can take advantage of a simple way to invest in Mountain Shadows Foundation and receive tax benefits in return. You can donate any amount up to \$100,000 per year from your IRA directly to a qualified charity such as Mountain Shadows Foundation without having to pay income taxes on the money. This popular gift option is commonly called the IRA charitable rollover, but you may also see it referred to as a qualified charitable distribution, or QCD for short.

Securities and Mutual Funds

When you donate appreciated securities or mutual funds you have held more than one year to Mountain Shadows, you can reduce or even eliminate federal capital gains taxes on the transfer. You may also be entitled to a federal income tax charitable deduction based on the fair market value of the securities at the time of the transfer. Making a gift of securities or mutual funds offers you the chance to invest in work of Mountain Shadows while realizing important financial benefits for yourself.

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Action Steps

Contact Mountain Shadows Foundation for additional information regarding leaving Mountain Shadows a planned gift:

phone: 760.888.4302

e-mail: foundation@mtnshadows.org

Seek the advice of your financial or legal advisor.

If you include Mountain Shadows Foundation in your plans, please use the legal name and federal tax ID.

Legal Name: Mountain Shadows Foundation

Address: 970 Los Vallecitos Blvd., Suite 240 San Marcos, CA 92069

Federal Tax ID Number: 20-015907

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Mountain Shadows Foundation logo

Mountain Shadows Foundation is a
501(c)(3) nonprofit organization
Federal Tax ID #20-015907.

970 Los Vallecitos Blvd., Suite 240
San Marcos, CA 92069

MountainShadowsFoundation.org
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foundation@mtnshadows.org

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