



Your Legacy to Help the Most Needy

You have lived your life's journey with faith and values.

You can continue helping your neighbors in need beyond your lifetime.

**Would you prayerfully consider including
St. Vincent de Paul of Contra Costa County (SVdP) in your
Will to continue your generous legacy?**

**“Charity is the cement which binds communities
to God and persons to one another.”**

- St. Vincent de Paul



Through St. Vincent de Paul of Contra Costa County,
you can continue supporting the needy by
designating SVdP in your will or trust.

St. Vincent de Paul of Contra Costa County
2210 Gladstone Dr., Pittsburg, CA 94565
www.svdpc-cc.org • 925 439-5060

Leaving a Legacy to Reflect your Values:

1. Name SVdP in Your Will or Trust:

Your Will or Trust should reflect how you want your assets distributed after your death. As you plan or update your Will or Trust, please prayerfully consider including SVdP as a beneficiary in your Will or Trust to reflect your faith and values. This can be done by stating a specific gift amount (ex. \$5,000, \$10,000 or \$50,000) or as a percentage of your estate.

2. Name SVdP as a beneficiary:

Name SVdP as a beneficiary of one of these assets:

- Retirement Plans such as an IRA, 401(k), 403(b), Keogh or profit-sharing pension plan
- Life Insurance Policy
- Checking or Savings Account
- Certificate of Deposit
- Commercial Annuity
- Mutual Fund or Financial Account

Here is the simple three-step process to name SVdP as beneficiary, either as Payable on Death (POD) or Transfer on Death (TOD):

1. Contact your retirement plan administrator, insurance company, bank, or financial institution and request a change-of-beneficiary form.
2. Decide what percentage you would like SVdP to receive and name us on the beneficiary form. Include this information:
**Legal Title: District Council of Contra Costa County Society of St. Vincent de Paul
Diocese of Oakland
Tax ID#: 94-1448577**
3. Return the completed form to your plan administrator's insurance company, bank or financial institution and let us know of your intentions so we can properly thank you.

LANGUAGE FOR YOUR ADVISOR

**Legal Title: District Council of Contra Costa County Society of St. Vincent de Paul
Diocese of Oakland (dba St. Vincent de Paul of Contra Costa)
Tax ID#: 94-1448577**

SPECIFIC GIFT LANGUAGE	RESIDUAL GIFT LANGUAGE	CONTINGENT GIFT LANGUAGE
I give and devise to St. Vincent de Paul of Contra Costa County the sum of \$_____ (or asset).	I give and devise to St. Vincent de Paul of Contra Costa County all (or <u>X%</u>) of the rest, residue, and remainder of my estate, both real and personal.	If (insert name) is not living at the time of my demise, I give and devise to St. Vincent de Paul of Contra Costa County the sum of \$_____.

Customized Language: If you or your advisor would like SVdP to provide you with customized beneficiary language that captures your legacy, please contact Barb Hunt at b.hunt@svdp-cc.org or 925-439-5060

St. Vincent de Paul of Contra Costa County is a 501(c)(3) tax-exempt organization.

(Return this page to St. Vincent de Paul of Contra Costa County to share your intentions.)



LET US KNOW:

Your financial, philanthropic, and estate goals are unique to you. We welcome the opportunity to work with you and/or your advisor as you leave your legacy in your estate plans.

Please let us know your wishes on the form below. Simply cut and fold on the dotted lines then return to St. Vincent de Paul of Contra Costa County at the address on the back of this sheet.

(fold here)

☐ I WOULD LIKE MORE INFORMATION ABOUT LEAVING A LEGACY GIFT TO
ST. VINCENT DE PAUL OF CONTRA COSTA COUNTY

Name _____

Address _____

Phone _____

Email _____

☐ I have already included St. Vincent de Paul of Contra Costa County in my plans.

☐ Yes, I/we would like to be included in honorary materials to inspire others to consider legacy giving.

☐ Please list as _____

☐ I/we wish to remain anonymous

(fold here)

BENEFITS TO YOU

- Will not reduce your income, nor diminish your savings.
- Could help minimize the taxes of your heirs.
- Eases complications for the executor of your estate.
- Supports the charities closest to your heart.
- Brings a sense of God's peace, knowing you are continuing your legacy of helping the poor by supporting SVdP.

OUR MISSION

“A network of friends, inspired by Gospel values,
growing in holiness and building a more just world
through personal relationships with and
service to people in need.”



PLACE
STAMP
HERE



ST. VINCENT DE PAUL OF CONTRA COSTA COUNTY
Attn: Barb Hunt, Development Director
2210 Gladstone Dr.
Pittsburg, CA 94565

