



## **Pathways Guardians Legacy Society Information Sheet**

**Mission:** Pathways Guardians Legacy Society exists to honor those who provide sustainable financial support to enhance the quality of life for adults with intellectual disabilities within a unique Christian environment.

**Purpose:** To ensure that Pathways Adult Learning Center's programs are strongly supported not only with current fundraising strategies, but also with funds for the future.

**What It Means to Be a Pathways Guardians Member:** Adults with intellectual and developmental disabilities (I/DD) often rely on their legal guardians to provide care, support and guidance for them for life. Legal guardians' greatest fear is often what will happen to their student after the guardian passes – will their student be compassionately cared for? Will they continue to have a meaningful, enriching life? As a Pathways Guardians Legacy Society member, you are providing these students and families with security knowing that Pathways will be there to provide learning, growth, and connection for their student long after their legal guardians have passed. When you decide to leave behind this kind of legacy, you become a sort of guardian angel, helping to ensure a hopeful future for many adults with I/DD.

### **Member Recognition:**

- A letter to thank the donor for their gift commitment and letting them know that they have been included in the Pathways Guardians Legacy Society program as a Founding Member or Inaugural Member.
- With their permission, their name will be included on the website under the Pathways Guardians Legacy Society webpage. Pathways Guardians Legacy Society members will have their name(s) listed only, no gift amounts will be listed.
- A gift will be given to each Pathways Guardians Legacy Society member that is invited to join. The gift will be given as they are inducted into the program each year.
- Each member will be invited to take a personal tour of the facilities.
- Each member will receive an invitation to special events.
- Each member will be invited to Pathways Guardians Legacy Society member only events, as they are planned in the future.
- The most important benefit you will receive from joining the Pathways Guardians Legacy Society is the satisfaction derived from making a lasting contribution to our long-term growth.

### **What is required of me as a member?**

- Once you become a member, we would ask you to please consider providing Pathways with a testimonial (a testimonial template can be provided). Your testimonial can be



anonymous, but we would use it on our webpage and in print to encourage others to make a commitment to our mission through their estate.

- As a member, we would ask that you consider becoming a Pathways Guardians Legacy Society Ambassador. Becoming an Ambassador would mean that you speak to others about your experience and commitment to our mission and encourage others to consider making Pathways Guardians Legacy Society a part of their legacy planning.
- As a member, we would ask that you be willing to talk about why you are a Pathways Guardians Legacy Society member to those around you at receptions, events, and meetings. You are not being asked to publicly speak, but if you are willing to do so, please let us know.

### The Pathways Guardians Legacy Society FAQs:

- **How do I become a member?** Contact the Pathways Adult Learning Center planned giving office at 918-491-0079 or [chris@tagpg.org](mailto:chris@tagpg.org) to learn more about legacy gift options and/or to confirm your planned gift.
- **What if I have already included Pathways Adult Learning Center in my plan?** Thank you!! Please contact the Pathways Adult Learning Center planned giving office at 918-491-0079 or [chris@tagpg.org](mailto:chris@tagpg.org) to discuss what is needed to confirm your gift.
- **What is a legacy gift?** A legacy gift is a gift made through a person's estate, typically with assets they own in their estate. When a person passes away, they pass on their assets to heirs and have the opportunity to give to charity as well. Legacy gifts could be one or more of the following types of gifts:
  - Will (codicil in the will)
  - Trust (remainder or lead trust gift)
  - POD (payable on death for a bank account)
  - TOD (transferred on death for securities, vehicles, or real estate)
  - Beneficiary designations of life insurance, retirement accounts, beneficial deeds, etc.
  - Charitable gift annuity (guaranteed income for life for one or two lives)
- **Is my gift information confidential?** Because Pathways Adult Learning Center has a legacy office that handles all of our processes, your information is held confidential. No information is shared with Pathways Adult Learning Center, except the gift amount and your name, if you provide permission to have that information shared with us.
- **Why do you need to know my gift amount?** First, we want to be able to celebrate the total amount of gifts committed to our Pathways Guardians Legacy Society fund, and in order to do that our legacy office has to know the amount of each gift. Second, Pathways Adult Learning Center needs to understand the cumulative gift amount of all gifts to assist with long range planning and program growth.



- **Will you publish my gift amount on the website or in publications?** We will not publish any gift amounts in our public areas, to protect your information. Our top leadership will have this information in our files as a reference to our progress and goals, but it will not be shared with anyone beyond the Executive Director and Board Chair.