



## How will your community remember you?

When you include CVOEO in your will, you're taking action to end poverty, build community, and create a healthier, happier, and more just future for everyone in Vermont.

Most planned gifts are designated in a will or trust. There are many options to help future generations thrive and we are committed to finding the best fit for you.

**"I am grateful to be able to share some of my retirement assets with CVOEO at this challenging time for Vermonters. I have immense appreciation for how CVOEO helps Vermonters survive and thrive."  
—Patricia F., CVOEO donor since 1993**



# Popular Planned Giving Options

## Gifts in a Will or Trust

When you include CVOEO in your estate planning you can make a bigger difference in the future of Vermont. Consider using the following language in your will, "I give and bequeath unto CVOEO, tax ID #03-0216837, \_\_\_% of the rest, residue, and remainder of my estate to be used for general charitable purposes."

## Beneficiary Designations

You can make CVOEO a beneficiary of your retirement account, life insurance, donor-advised fund (DAF), or other assets. Contact your fund administrator for a beneficiary form.

## Charitable Gift Annuities, Remainder Trusts, & Lead Trusts

We partner with the Vermont Community Foundation to offer these through your will, living trust, retirement plans, and other mechanisms that may provide fixed income back to you or a loved one for life.

## Gift from a Retirement Plan or IRA

A Qualified Charitable Distribution or QCD (sometimes called an IRA Charitable Rollover) is a great way to make a tax-free gift now to CVOEO and also satisfy your Required Minimum Distribution (RMD). Instruct your IRA provider to distribute funds directly to CVOEO.

**CVOEO is a 501(c)3 non-profit. Tax ID #03-0216837.**  
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