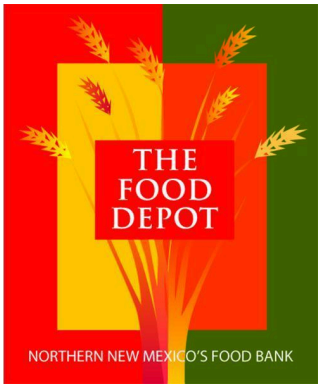

Legacy and Estate Giving

Legacy and Estate Gifts bequeathed to The Food Depot are an inspiring way for generous individuals to provide lasting hunger relief for Northern New Mexicans. By leaving major gifts to The Food Depot, you can be confident that your assets will be utilized efficiently and effectively, and in a manner that reflects your interest and values. You will lessen your burden of income and estate taxes; and most importantly, your work and support for The Food Depot's mission will last beyond your lifetime, feeding Northern New Mexicans facing food insecurity in generations to come.

Create A Nourishing Legacy

Creating a legacy gift to address food insecurity through The Food Depot is a significant and impactful way to support your Northern New Mexican Community. Simply name The Food Depot as a beneficiary in your will or estate plans. Here are a few examples of how to plan and establish a gift:

- Donor Advised Funds
- Retirement Plans
- Insurance Policies
- Bequests
- Trusts
- Endowment

Example of a Legacy Gift Plan

Jane Doe's Legacy Gift to The Food Depot*

- *Objective:* To reduce food insecurity in Northern New Mexico.
- *Gift Type:* Bequest in Will and Beneficiary Designation

- *Specific Use:* $500,000 Bequest: Establish the "Jane Doe Food Security Fund" to provide meals to individuals living in New Mexico experiencing food insecurity.
- *Life Insurance Policy*: Name The Food Depot as the beneficiary of a $500,000 life insurance policy, designated for the purchase of fresh produce and healthy food options.
- *Implementation:*
    - Memorandum of Understanding (MOU): An agreement with The Food Depot outlining the use of the funds for enhanced food security.
    - Recognition: The Food Depot will induct Jane Doe into the Legacy Society and include them on the Legacy Society Mural.

By following these steps, you can create a meaningful and lasting legacy gift that addresses food insecurity and supports the vital work of The Food Depot in your community.

*The aforementioned example provided is only to illustrate a possible example and is not intended to be an answer to your unique needs and wishes.

Next Steps

To obtain more information on how to leave a legacy gift, please visit thefooddepot.org/donate, complete a Donor Intent Form, or contact Steven Bolin, Director of Development at (505) 510-5872 or development@thefooddepot.org.

When planning a legacy gift, it's important to work closely with The Food Depot and potentially a financial advisor or estate planner to ensure your gift is structured in a way that maximizes its impact and aligns with your philanthropic goals. The Food Depot can often provide guidance on its most pressing needs and how best to structure a gift to support the mission long-term.

The Food Depot does not make any claims or endorsements to what is best for you with planned giving options. As with any estate planning or legacy gifts, we recommend you consult with a professional advisor (i.e., Certified Public Accountant, Attorney, or Financial Planner) specializing in estate planning.

Sample Estate Planning Contacts for The Food Depot

Below is a list of local Estate Planning Attorneys, Financial Advisors, and Certified Public Accountants (CPAs). The Food Depot does not endorse or recommend any specific individual or firm.

	Name	Phone	Address
Estate Planning Attorneys	Thomas W. Banner	(505) 428-0523	1512 Pacheco St., Unit D203, Santa Fe, NM 87505
	Ryan Sise	(505) 302-5456	4801 Lang Ave NE #110, Albuquerque, NM 87109
	Kate Fitz Gibbon	(505) 216-9349	460 St. Michael's Drive, Ste. 1203, Santa Fe, NM 87505
	Dorene A. Kuffer	(505) 924-1000	150 Washington Avenue, Suite 210, Santa Fe, NM 87501
Financial Advisors	John Rochester, QPFC	(505) 988-7722	150 Washington Avenue, Suite 301, Santa Fe, NM 87501
	LongView Asset Management	(505) 988-9555	136 Grant Avenue, Santa Fe, New Mexico 87501
	The Rikoon Group	(505) 989-3581	2218 Old Arroyo Chamiso, Santa Fe, NM 87505
	Savant Wealth Management	(505) 800-7797	2000 Old Pecos Trail, Suite C, Santa Fe NM 87505
Certified Public Accountants	Jim Colombo, CPA	(505) 983-9000	1424 Paseo De Peralta, Santa Fe, NM 87501
	Kuderik and Associates	(833) 637-2281	1012 Marquez Pl Suite 301-A, Santa Fe, NM 87505
	Mike Swain	(505) 988-3770	2050 Botulph Road, Suite A, Santa Fe, NM 87505
	Carolyn H. Gonzales, CPA	(505) 424-9444	2213 Brothers Road #200, Santa Fe, NM 87505

Sample verbiage for estate bequests:

I hereby bequeath $[specific asset or cash amount] to The Food Depot to be paid from my estate.

The Food Depot
Tax ID #85-0416803
1222 A Siler Road, Santa Fe, New Mexico 87507
Contact: Steven Bolin, Director of Development
(505) 510-5872
development@thefooddepot.org

Transfer Information for The Food Depot

The following transfer information covers most types of contributions made in kind to The Food Depot:

- *Morgan Stanley Internal Transfer:*
    - Transfer from a Morgan Stanley account to The Food Depot by requesting a “journal” to the following:

    - The Food Depot account #217-027980-049

- *All External Transfers:*
    - Transfer from another brokerage firm to The Food Depot by requesting a Depository Transfer Check (DTC) transfer to the following:
        - Morgan Stanley DTC #0015
        - The Food Depot account #217-027980-049

Please ensure your broker includes your name on the stock gift so Th Depot can properly acknowledge the gift.

ACH Instructions

Donors access ACH by clicking "e-check" when making a donation on The Food Depot website.

If it's an ACH coming from a donor-advised fund, it is best to call Finance at 505-510-5803 or email them at finance@thefooddepot.org.

Contact Information:

The Food Depot
Steven Bolin
Director of Development
1222 A Siler Road
Santa Fe, New Mexico 87507
(505) 510-5872
development@thefooddepot.org

The Vista Group at Morgan Stanley
John A. Rochester
Senior Vice President, Wealth Advisor
150 Washington Ave., Suite 301
Santa Fe, New Mexico 87501
(505) 988-7752 or (800) 757-3834

Additional Information

- IRS - Requirements for Retirement Plan and IRA Minimum Distributions
- The Food Depot's Estate Gift Intention Form