



ShelterBox



LEAVE A LEGACY

*and provide shelter for generations to come*

Imagine a ShelterBox being loaded onto a truck, driven hundreds of miles, crossing border after border, and being taken straight to the heart of the latest disaster.

Imagine a family who thought they'd been totally forgotten, receiving this green box containing the materials they need to rebuild their lives.

Imagine that your legacy is what put it there, and will continue to do so for years to come.



*Philippines, Typhoon Haiyan, 2013*



# LEAVE A LEGACY WITH SHELTERBOX

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**With more than 104 million forced to flee their homes, there are more people displaced across our world than in any other time in recorded history. As the scale and severity of disasters continue to grow, so does our desire to do more to reach these families made homeless by disaster and conflict situations. Every day, we are working to provide basic shelter and essential household supplies to families who have lost everything in an instant.**

While this work is complex and challenging, and doesn't often make the headlines, it is transformative to the families we serve and is powered by your support.

Established more than 20 years ago to help meet the most basic of human needs, ShelterBox has become a movement of committed volunteers and supporters, who make

this life-saving work possible. Over the last two decades, ShelterBox has sheltered more than 2,000,000 people in over 100 countries and has received two Nobel Peace Prize nominations.

*This year, we are launching a new way to invest in the future of ShelterBox, the Legacy Society.*

Your gift will ensure we can continue to bring life-saving shelter and supplies to the most vulnerable families in the world, now and for generations to come. We are profoundly grateful for your involvement in ShelterBox.

With gratitude,



A handwritten signature in blue ink that reads "Kerri Murray". The signature is fluid and cursive, written on a light-colored background.

**Kerri Murray**  
**President | ShelterBox USA**



# YOUR PASSION IN ACTION

*A legacy gift helps ShelterBox deliver  
the essentials people need in desperate times*

**At a time when more people have been displaced from their homes by conflict and natural disaster than at any time in history, your desire to make a lasting impact is very meaningful. By leaving a legacy gift, you will give a family in need the power to transform their own lives.**

To the people we help, a ShelterBox brings much more than just shelter—it brings hope, warmth, safety and a place where families come together to recover and rebuild their lives.

Our expertise in emergencies enables us to reach the most remote communities in the world that have been devastated by disaster. We prioritize the most vulnerable families to make sure no one is forgotten or left behind.

We work hard to understand the impact of each disaster and the needs of individual communities. By partnering with organizations like Rotary International, we are able to transport aid across continents, bridge languages and take the path that leads straight to the families who need our help.

*Indonesia, Earthquakes, 2018*





## THE IMPACT OF A LEGACY GIFT

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**\$10,000**

can provide a ShelterBox to  
10 families.

**\$25,000**

can light up a small town with solar  
lights, bringing safety and hope.

**\$50,000**

can house 100 families in their  
own ShelterBox Tent.

**\$100,000**

can help 1,000 families rebuild  
their homes with ShelterKits.

**\$250,000**

can transform a community  
devastated by a disaster.



# REBUILDING HOMES AND ENABLING RECOVERY

*When Cyclone Idai hit southern Africa, it washed away entire villages like Mwalija in Malawi.*

**Having lost everything after Cyclone Idai, Stephano and Mary were determined to rebuild their livelihoods, together with the rest of the community in Mwalija. Their story is one of recovery.**

Stephano recalled: “On the day of the flood the rain started at 5 pm, but the flood that caused houses to fall started at 11 pm. By the middle of the night, all the houses had fallen. Our livestock were getting carried away with the water. The crocodiles were so close to us, attacking the cows.

We were working hard to save our children who have not yet tested the world. This is why we put them in the trees. When we saw there was more water coming, we would take them to a higher tree. We stayed for 24 hours in the water.”

After the storm, ShelterBox provided 10,000 people, including Stephano and Mary, with emergency aid so they could begin to rebuild their lives. Their village moved from a collective camp to the safety of higher ground and started to rebuild their homes.



“Some of us are receiving help but we are also working in order for things to get better. That’s why we work, because we are looking to the future. As for now”, Stephano shared,

*“the sun rises. One goes to the farm, one stays at the house and the children go to school. Life is getting restored. Now we are living on higher land, we are living without worries.”*





*Mary, Stephano, and their children, Mwalija, Malawi, Cyclone Idai, 2019*



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“  
*I support ShelterBox  
and the crucial work  
they do all over the world  
helping families who  
have lost everything.  
Shelter and togetherness  
are stepping stones to  
recovery. If you are able,  
please give.*”

DAME JUDI DENCH



## WAYS TO GIVE

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### *Leave a legacy gift and empower families to rebuild their lives*

A legacy gift is a planned future donation to a charity, given through a will or other avenue. A legacy gift is often made upon a person's death, but not always. These gifts can take a number of forms, including material goods, property, stocks, real estate.

### *Giving Through Your Will or Trust*

Leaving a gift in your will or revocable living trust is a wonderful way to ensure that your support of the ShelterBox helps our work for generations to come.

You may designate a specific dollar amount or percentage of your estate to ShelterBox, while leaving other assets to your loved ones. There is no minimum requirement. Every legacy gift makes a difference.

### *Follow these steps:*

- Provide your attorney with the following sample language:  
"I give [the residue of my estate], or [ \_\_\_\_ % of the residue of my estate], or [the sum of \_\_\_\_\_ dollars] to ShelterBox USA, Santa Barbara, CA for its general purposes."
- Include this information:  
ShelterBox USA  
101 Innovation Place  
Santa Barbara, CA 93108  
Tax ID# 20-0471604



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## ***Giving by Beneficiary Designation***

### **Retirement Accounts and IRAs**

Naming ShelterBox as a beneficiary of a retirement plan or IRA is a smart way to give and save your family taxes. Withdrawals from retirement accounts are usually fully taxable. That is, unless you designate a tax-exempt entity like ShelterBox as a beneficiary. Because ShelterBox is tax-exempt, 100% of your retirement account or IRA gift will go towards creating your legacy.

### **Charitable IRA Rollover**

If you are age 70 ½ and older, you can make direct charitable contributions from your IRA (Individual Retirement Account) to ShelterBox without any tax consequences. Please consult with your tax adviser if you are making regular additions to your IRA beyond age 70 ½.

As you may be aware, all IRA withdrawals are fully taxable. A new law, though, makes it possible to direct up to \$100,000 to ShelterBox or other nonprofit organizations a year with no income taxes being charged. These Charitable IRA Rollover gifts additionally fulfill your

annual IRA required minimum distribution and allow non-itemizers to receive tax benefits from gifts to ShelterBox.

To use the Charitable IRA Rollover provision to make an immediate impact with ShelterBox:

- You must be age 70 ½ or older
- The funds must go directly from your IRA account to ShelterBox
- You cannot exceed \$100,000 in Rollover Gifts a year
- Rollover gifts must be unrestricted and cannot provide any incidental benefits to the donor.

*Iraq-Syrian Conflict, 2012*





### Certificates of Deposit, Bank & Brokerage Accounts, Life Insurance

Another simple way to have a lasting impact is to name ShelterBox as beneficiary of a certificate of deposit, bank or brokerage account or life insurance policy.

### Donor-Advised Funds

Consider naming ShelterBox as a beneficiary of any contributions remaining in your donor-advised fund. Or, designate ShelterBox to receive a portion of the remaining account value, leaving the balance for your family or friends to continue your legacy of philanthropy.



### *Follow these steps:*

- Contact your retirement plan or IRA administrator, bank or insurance company and request a beneficiary form.
- Write “ShelterBox USA, Santa Barbara, CA, Federal Tax ID Number 20-0471604” as a sole or partial beneficiary of your account.
- Sign and return the form to your plan administrator and keep a copy for your files.
- Share a copy with ShelterBox.



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*Bangladesh, Conflict, 2018*

SHELTERBOX USA

## *Giving Through a Charitable Annuity*

When you create a charitable gift annuity with ShelterBox, you and/or a loved one receive guaranteed fixed quarterly payments for life based on your age(s) and a charitable income tax deduction in the year of the donation.

You receive the annuity income for life and the remaining funds after your passing to establish your legacy with ShelterBox.

### CURRENT CHARITABLE GIFT ANNUITY RATES

Single Life	
Age	Rate
70	4.7%
75	5.4%
80	6.5%
85	7.6%
90 and older	8.6%

SOURCE: American Council of Gift Annuities (ACGA) rate schedule effective on July 1, 2020.



YOUR KEY BENEFITS

- Establishing a gift annuity with appreciated stock may reduce capital gains.
- A gift annuity is a creative way to meet the long-term financial needs of a spouse or another loved one.
- If you want immediate tax savings but don't need payments until later, you may choose a deferred annuity.
- A portion of your annuity payments is tax-free.
- The older you are when your annuity begins, the higher your payment rate.

Two Lives	
Ages	Rate
70	4.2%
75	4.6%
80	5.4%
85	6.5%
90 and older	8.2%

Rates are subject to periodic change, always confirm if rates quoted are still effective.

Follow these steps:

- Request a personalized illustration of your gift annuity options. Email our Legacy Officer at [Legacy@ShelterBoxUSA.org](mailto:Legacy@ShelterBoxUSA.org).
- Minimum Gift Annuity to ShelterBox is \$20,000 and minimum age(s) is 65.
- Sign and return a simple contract.
- Receive fixed quarterly payments for the rest of your life or the lives of up to two beneficiaries.



ShelterBox

## BE RECOGNIZED FOR YEARS TO COME

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*Most legacy giving opportunities enable you to:*

- Retain control of your assets during your lifetime
- Change your beneficiaries at any time
- Provide for loved ones and for ShelterBox
- Make your gift in honor or memory of someone
- Join a group of like-minded people
- Make a global impact
- Leave a lasting legacy with any size gift

To tell us about a gift you have planned or to explore the best legacy giving options for you and your family, please contact our Legacy Officer at [Legacy@ShelterBoxUSA.org](mailto:Legacy@ShelterBoxUSA.org).

## WE ARE HERE TO HELP

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There are many ways to give. ShelterBox has the experience to guide you in considering the options described in this brochure, and other gifts, such as real estate or charitable trusts.

We encourage you to discuss this important process with your loved ones and financial and legal advisors.



*Fiji, Cyclone Winston, 2016*



# THE SHELTERBOX LEGACY SOCIETY

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ShelterBox honors your commitment to provide families with life-saving shelter and the essential tools needed to rebuild their homes and transform their lives after disaster.

Your pledge represents your belief in shelter as a human right and signifies an alignment of values to be preserved for the future.

In recognition of your generosity, we will welcome you to the ShelterBox Legacy Society. This group of dedicated philanthropists are choosing to take action at a time when more people have been displaced than ever before.

As a Legacy Society member, you will hear first about our latest initiatives and be invited to special briefings and events. Your membership in the society will be noted in the ShelterBox Annual Report, or you may choose to remain anonymous.



# ShelterBox



*Syria, Conflict, 2018*



# ShelterBox

For more information, please contact our Legacy Officer  
at [Legacy@ShelterBoxUSA.org](mailto:Legacy@ShelterBoxUSA.org) or call 805.608.2400

## **ShelterBox USA**

101 Innovation Place  
Santa Barbara, CA 93108

or

MAILING: PO BOX 5055, Santa Barbara, CA 93150

**[www.ShelterBoxUSA.org](http://www.ShelterBoxUSA.org)**

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**Rotary**



ShelterBox is a charity independent of Rotary International and The Rotary Foundation. ShelterBox USA is a 501(c)(3) nonprofit organization in the United States and registered in the state of Florida. EIN 20-0471604. Donations to ShelterBox USA are tax-deductible to the extent allowed by U.S. law.