



Information for Professional Advisors

We welcome the opportunity to work with you in helping your client identify tax-wise and beneficial ways to support our mission through a charitable gift. Please feel free to contact us directly for information or assistance on a confidential basis. By working together we can help donors make a gift that will have the greatest philanthropic benefit for the Southern Maine Agency on Aging and be in his or her best interests.

Our Development Office provides support for individuals who wish to make charitable gifts to us. We do not offer legal or financial advice. We strongly recommend that individuals consult with their legal, financial and tax advisors as they consider establishing any type of planned gift.

Mission

The mission of the Southern Maine Agency on Aging is to improve the physical, emotional and economic well being of older adults in southern Maine.

Governance

A twelve-member Board of Directors from throughout York and Cumberland counties governs the organization. They are civic leaders, business and professional persons and philanthropists.

Legal Address

Southern Maine Agency on Aging
136 US Route One
Scarborough, ME 04074

TAX I. D. Number

Founded in 1972, the Agency's Tax ID (EIN) number is 01-0360259. Contact the Development Office a (207) 396-6591 for a copy of our 501(c)(3) tax letter or for instructions on how to give securities etc. We are registered with the State of Maine as a charitable organization.

Better Business Bureau Seal of Approval



The Southern Maine Agency on Aging proudly meets all accountability standards for charities set by the Better Business Bureau serving the New England area.

In drafting a new will or codicil or establishing a trust, the following is sample bequest language for the Southern Maine Agency on Aging:

"I give to Southern Maine Agency on Aging (SMAA), a Maine nonprofit organization, located in Scarborough, Maine, (____% of the estate or the sum of \$_____/____% of the residuary estate). This gift is to be placed in said Agency's endowment, from which a spending portion will be used to support the Agency's activities and programs."

To restrict the spending portion to a specific SMAA program, please have the second sentence of the sample language read:

"This gift is to be placed in said Agency's endowment, from which the spending portion will be used to support [name of the specific program you wish to restrict to]."

For further information please contact:

Peg Brown, CFRE, Director of Development
(207) 396-6590 mbrown@smaa.org

Visit our planned giving site at www.smaa.org/planned_giving.php