

Sample Planned Giving Brochure Language

Disclaimer: The information in this brochure is provided for educational and informational purposes only and is not intended to be and does not constitute as legal, financial or taxation advice. This brochure is general in nature and should only be acted on after completing due diligence and upon consulting with a professional advisor.

ORGANIZATIONAL VISION

LEAVE A LEGACY

Although the (ORGANIZATION) has been successful at raising annual operating funds in the past, planning for the future needs of _____, _____, and _____ requires that we secure funding in new ways that would be more sustaining than what is possible through our annual appeal. Generous donors have shown us that this can be accomplished through planned giving.

WHAT IS PLANNED GIVING?

Basically, planned giving is providing now, for a donation to occur in the future. One of the most important facets of planning is aligning your assets with your goals and aspirations. The manner in which you structure your plan can be as simple or complex as you like. Planned gifts provide a well thought-out and holistic strategy to achieve your goals and perpetuate your values. Your gift can be made available for current use to address the needs of today or endowed in perpetuity to meet the changing needs of tomorrow. There are countless ways for you to make a difference such as:

- Making a bequest in a will or trust.

- Beneficiary designation in an IRA account, 401k plan, or insurance policy
- Directing a Donor Advised Charitable Fund to make a distribution to (ORG)
- Establishing a Charitable Remainder Trust or similar plan

Each of these, and other sophisticated techniques, are available to our donors to provide for the future of the ORGANIZATION and in many cases, to secure significant tax advantages and even provide generous income benefits for the donor.

Please consider a generous gift to this important cause. Your support will make all the difference in the world!

SIMPLE BEQUEST

The bequest is a revocable gift from a will or personal trust of cash, securities, real estate, or other assets. A common form of a bequest is a percentage of one's assets or the residual value of the estate given in your memory or in that of a loved one. You can work with your favorite

charity to create a lasting legacy. Your existing Will can be easily amended through a codicil. You can designate (ORG) in your will or trust to receive a bequest upon your death, knowing that you are helping fund our future.

SAMPLE BEQUEST LANGUAGE

"I give, devise, and bequeath to (organization), Address, City, State Zip, EIN: 86-1000000", the sum of \$_____; OR _____% of my estate; OR the following securities, real estate or tangible property _____; OR _____% of the remainder of my estate after specific amounts are bequeathed to other beneficiaries and estate-related expenses are paid.

INSURANCE BENEFICIARY

Policies that are no longer needed to protect your family from financial burdens of your passing can be used to fund your charitable plans by designating one or more of your favorite charities such as (ORG) as the beneficiary. You may be able to transfer ownership of a policy with cash value to (ORG) and receive a charitable deduction. (ORG) will receive the face value of the policy upon your death.

IRA BENEFICIARY DESIGNATION

Using retirement plan assets to fulfill your philanthropic goals can be far more advantageous than directing these assets to your estate or leaving them to heirs. Distributions from a retirement plan are typically taxable to the recipient if they are not a recognized charitable organization. As you review your estate plan, you may realize that you have an IRA or 401k account that is likely to be significantly impacted by both estate and income taxes. Left to (ORG), however, IRA gifts can avoid all taxes. Talk to your IRA custodian and make the (organization) a beneficiary of your IRA, ensuring that tax-vulnerable gifts pass to your charity, and tax-free gifts go directly to your heirs.

DONOR ADVISED FUND

Perhaps you need a substantial current tax deduction, and want to provide a secure income for your favored charities, including the (organization). Consulting with your tax advisor, you may decide that a Donor Advised Fund administered by a large mutual fund company will give you the vehicle you need for the immediate tax deduction along with the peace of mind knowing that you have provided for the long-term security of your charities. You can fund your gift with appreciated securities for further tax savings. And, your heirs can continue to advise the Fund after your death.

GIFTS WITH INCOME

You may be retired and your estate may include a substantial amount of appreciated stock, which provides little income. You would like to increase your available income, and make charitable donations to support (ORGANIZATION). If you sell the stock, capital gains taxes will reduce the amount available for both purposes.

A charitable remainder trust may be the solution. You can place cash, stock, or other property, such as real estate, in a trust that pays annual income to you and your spouse (or another named beneficiary) for a predetermined amount of time, after which the trust ends and the assets go to (organization). You receive an income tax deduction for the “present value” of the gift to (ORG).

Charitable Remainder Trusts and similar strategies have significant legal and tax implications, and should be considered by donors in consultation with their legal and tax advisors.

CHARITABLE GIFT ANNUITY

A charitable gift annuity is an irrevocable agreement between you and (ORG), whereby you donate cash or stock now, gain immediate tax benefits, and receive a fixed and guaranteed income for life for you and/or a loved one.

GIFTS OF PROPERTY

Gifts of privately held securities restricted stock, real and personal property can be used to support (ORG). Depending on the nature of the property, a charitable intermediary, specializing in these transactions, may be utilized to complete the sale of the property and transfer of the proceeds to a donor advised fund or to the charity directly. The donor’s charitable deduction is based on the value of the asset at the time it is contributed.

FINANCIAL ADVISORS

The strategies outlined here have legal and tax implications for the donor, and should be undertaken with the guidance and advice of trusted financial advisors and the (ORG) Director of Planned Giving.

We maintain in our office a listing of attorneys, financial planners, accountants and other professionals who have indicated to us their interest in assisting our donors through the complexities of planned giving in light of the donor’s personal circumstances.

In addition, several mutual fund companies have established donor advised charitable funds which can be used as part of a comprehensive financial plan.

You can also call our Director of Planned Giving who can meet with you to discuss all your options at no cost or obligation.

Please let us know how we can help.

REMARKS ABOUT YOUR ORGANIZATION AND HOW DONOR SUPPORT WILL MOVE IT FORWARD.

The (organization) has achieved remarkable success over the past two decades because of the support of our donors, partners and volunteers. (ORG) serves a unique and powerful role (ORGANIZATIONAL ACCOMPLISHMENTS)

With the support of people like you, we have achieved that goal. Now we want to ensure that our future will be as bright as our past...that new challenges

Consider becoming part of our Legacy Program. Funding our Future...Believing in our Tomorrow.

YOUR LEGACY IS FOREVER

Whether your gift is endowed or for current use, your legacy is forever. A legacy isn't only what you leave to the world. When you add a charity or charities in your estate plan, you create something powerful; a legacy that tells future generations what causes mattered to you. Your action will inspire others to follow your example and make a difference in their own way!

CONTACT US

For more information on giving opportunities, please contact Ron Huddleston at (623) 444-4444 or ron@ORGANZIATION.org.

OR VISIT
ORGANIZATION.org/plannedgiving

How to Create a Legacy Society Brochure

Creating an effective brochure is essential to build awareness for planned giving and to invite new members into a Legacy Society.

Effective brochures need to be both persuasive and informational. Try to keep a balance between the two. Remember, the ultimate goal is to encourage people to join the Legacy Society. Give them a way to respond.

- They need a reason to join (persuasive)
- They need to understand how to join (informational)
- They need explicit directions to pursue next steps (response)

Brochure Cover

Wording for Cover

- *An Invitation to Join (name of Legacy Society)*

Artwork and Pictures for cover

- Legacy Society or (organization) logo
- Picture or drawing of the (organization) or other image that is recognizable to (prospects)

Brochure Content

The brochure should cover the following.

History and Purpose of the Legacy Society

Include brief information about the history and purpose of the Legacy Society. Answer the following questions:

- Is the Legacy Society named after someone?
- What was his/her/their compelling contribution to the (organization)?
- When was the Legacy Society established?
- What is its purpose?

Sample text: The purpose of the Society is to recognize those individuals and families who have remembered (organization) in their estate plans through a documented planned gift. More so, the Society serves to enable members and friends to witness to the value of (organization) in their lives and secure its future for generations to come.

Vision for the Legacy Society

Share the vision for the Legacy Society.

Sample text: *Gifts to the Legacy Society are acts of hope for the future of our (organization). Through your generosity, (Organization) will be well equipped to serve our community in generations to come... (continue along this theme)*

The Benefits or Rewards of Membership

Consider the spiritual rewards of giving.

Sample text: *We give out of our treasure today to provide opportunities others in the future... (continue along this theme)*

Describe the benefits and honors of membership in the Society.

Sample text: *Every year, names of new members of the Legacy Society will be added to a plaque displayed in the (organization's) lobby or other place. All Legacy Society members will be honored at an annual members dinner. Members will also be invited to seminars and special events on planned giving, financial and estate planning.*

Becoming a Member

Encourage a planned gift to the Legacy Society.

Sample text: *You may become a member of the Legacy Society simply by notifying us that you have named (organization) a beneficiary in your will or estate plan.*

You may also require members to sign a declaration of intention. If so, include that information and direct them where to obtain the Legacy Society enrollment form.

Forms of Planned Giving

Include a brief description of the types of planned gifts. Sample text:

- ***A Bequest in a Will:*** *The easiest and most common way of making a planned gift is through a bequest in your will. You can designate a specific amount of money, a percentage of your estate, or a specific asset. (Organization) could also be named as a contingent beneficiary.*
- ***Life Income Gifts:*** *Gifts such as a charitable gift annuity, a charitable remainder trust, or a pooled income fund provide you and/or your designated beneficiary income for life. Upon your passing, the (organization) receives the gift. Life*

income gifts generally reduce or eliminate certain taxes and guarantee an income for life.

- **Life Insurance:** *Life insurance can be used to make a sizeable gift to (Organization). For example, you can purchase a new policy and make the (organization) the owner and beneficiary of the policy. You can make (Organization) the owner and beneficiary of an existing policy you no longer need. Or you can name (Organization) a contingent beneficiary of an existing policy. Your life insurance could “endow” your annual pledge to (Organization).*
- **A Life Estate:** *You can deed your home, vacation property, or condominium to (Organization) and retain the right to live in the property and/or receive income from the property for as long as you or your beneficiaries live. A life estate gift reduces capital gains, inheritance, and estate taxes and offers an income tax deduction as well.*

Consider including how planned gifts can be funded.

Sample text: Depending on the type of planned gift, different assets may be used to fund it. Cash, appreciated securities, appreciated property, or personal property (such as jewelry or art) may be options. Check with your financial and legal advisors before making a gift.

Designating Your Gift

Tell how you accept or encourage designated gifts. If your endowment fund contains designated fund opportunities, you may want to include this information.

Sample text from (organization), Scottsdale, AZ: A planned gift to (Organization) goes to The Heritage Funds, which have been designed to allow you intentional control over what happens to your gift. You can select the particular fund into which your gift will go:

- **The Building Fund:** *for the maintenance and repair of the buildings and grounds, and for projects of enduring character.*
- **The Scholarship Fund:** *for support of worthy students furthering their education at (organization), and for new student outreach projects.*
- **The Education Fund:** *for the continuing education of (Organization’s) instructors and staff.*
- **The (organization) Equipment & Programs Fund:** *for the purchase and replacement of outdated equipment and the establishment of new educational programs for our students.*

- ***The Remembrance Fund:*** for memorial gifts and "in lieu of" contributions, to be used for worthwhile purposes.

Testimonials (if desired)

You may want to include a compelling quote or brief story from (prospects) to encourage others to follow their example, similar to those below:

- *“(Organization) has been an inspiration to us for more 50 years...we want it to do the same to others in the same way. That’s why we’ve joined the Legacy Society.”*
- *“For me, the Legacy Society is my connection to generations of (Organization) (prospects)—past and future. I’m excited to take my place in our history.”*
- *“I realized that giving of “my treasure” isn’t limited to my earthly lifetime. By joining the Legacy Society, I can continue to bless the (organization) for years to come.”*

Response card (this section of the brochure would tear off)

Clearly direct (prospects) to respond.

- Include space for people to write their name/address/ phone/email.
- Provide a contact person for returning the form to the (organization), e.g. Chair of Legacy Society.
- Make sure (organization) address, phone, website information is clearly visible.
- A response card should include clear options about giving.

Sample text:

I am/we are interested in learning more about the Legacy Society and planned giving options. Please send me/us information on the following (check as many as apply):

- Bequest in a will*
- Life income gift*
- Life insurance*
- Life estate*
- Other*

I/we would like to speak to someone confidentially about legacy stewardship

I/we have already made provision for a planned gift to (Organization) as indicated above (please check appropriate box).

Brochure Insert – Planned Giving & The (Society) - Simple Brochure Language

PLANNED GIVING

Planned Giving provides a way for you to make a gift to (Organization) and at the same time receive favorable tax considerations. When you make a gift to the Foundation through your will, trust, or estate plan, you will make it possible for the hospital to preserve and perpetuate its high standards of quality care, and help shape its future by assuring a long-term, stable financial environment. Following are planned giving opportunities that benefit both you and the hospital:

Gifts You Can Make Today: An outright gift of cash, securities, real estate, or other personal property, brings immediate benefit to the Foundation and tax advantages for you.

Gifts You Can Arrange Now To Be Received Later: Gifts arranged today for the future benefit of the Foundation can give you greater control over your assets, reduce estate taxes, pay an income for life, and protect the value of intended bequests to loved ones.

- ***Bequest through your will or trust:*** Naming (Organization) as a beneficiary in your will and/or trust is an easy way to distribute all or part of your estate to the Foundation. You can specify a dollar amount, a percentage of your estate, give specific property, or what is left after other bequests.
- ***Gifts that give back:*** You can make a gift today and receive income for the rest of your life. Life income plans, such as charitable remainder trusts, pooled income funds, and charitable gift annuities, can help accomplish estate planning goals, provide income and capital gains tax savings, and allow you to convert appreciated assets to a source of income.
- ***Giving through life insurance or retirement plans:*** Gifts of retirement plan proceeds can produce significant tax savings for your heirs, and life insurance can be used to replace the value of assets you wish to give to the Foundation. You can name the Foundation as a beneficiary of these plans by simply requesting a change of beneficiary form from your organization.

Arranging a Temporary Gift: Through a charitable lead trust, you can fund gifts to the Foundation for a period of time, with the assets eventually returned to you or to other non-charitable beneficiaries. This plan may allow you to reduce estate and gift taxes that might otherwise be due on assets intended for children, grandchildren, or other loved ones.

(SOCIETY)

The (Society) was created to honor, recognize, and encourage bequests and life income gifts to (Organization). Membership in the Society is open to all individuals who have provided planned gifts through their will, trust, or estate plan. Members are not required to indicate the present or future value of their gift, and any legal documentation voluntarily provided to the Foundation is held in strict confidence.

(Society) was chosen as the namesake for this honorary society because of her great love for and commitment to excellence in medical care and nursing. She provided her first major gift to (Organization) in 1999. By the time she died in 2000, she had personally given more than \$3 million to the (org). Her legacy lives on through the (Society), established through a gift of more than \$5 million from the (Society) Charitable Trust.

LEAVE A LEGACY

How to Leave Your Mark on Arizona





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THE ARIZONA ELK SOCIETY'S VISION

To maintain and preserve wildlife habitat in support of a balanced elk herd and other wildlife.

To provide today's youth an opportunity to participate in wildlife conservation and the great outdoors.

To give our wounded warriors an opportunity to heal and find peace through outdoor activities and realize they are not alone or forgotten.

The Arizona Elk Society is a non-profit 501(c)(3) wildlife organization.





Life on our planet is changing, and the Arizona Elk Society has the opportunity – with your help – to change our corner of it for the better.

LEAVE A LEGACY AS BIG AS ALL OUTDOORS

Although the Arizona Elk Society has been successful at raising annual operating funds in the past, planning for the future needs of Arizona’s wildlife habitat, our youth, and wounded warriors requires that we secure funding in new ways that would be more sustaining than what is possible through our annual appeal. Generous donors have shown us that this can be accomplished through planned giving.

WHAT IS PLANNED GIVING?

Basically, planned giving is providing now, for a donation to occur in the future. One of the most important facets of planning is aligning your assets with your goals and aspirations. The manner in which you structure your plan can be as simple or complex as you like. Planned gifts provide a well thought-out and holistic strategy to achieve your goals and perpetuate your values. Your gift can be made available for current use to address the needs of today or endowed in perpetuity to meet the changing needs of tomorrow. There are countless ways for you to make a difference such as:

- Making a bequest in a will or trust
- Beneficiary designation in an IRA account, 401k plan, or insurance policy
- Directing a Donor Advised Charitable Fund to make a distribution to AES
- Establishing a Charitable Remainder Trust or similar plan

Each of these, and other sophisticated techniques, are available to our donors to provide for the future of the Arizona Elk Society and in many cases, to secure significant tax advantages and even provide generous income benefits for the donor.

Please consider a generous gift to this important cause. Your support will make all the difference in the world!

SIMPLE BEQUEST

The bequest is a revocable gift from a will or personal trust of cash, securities, real estate, or other assets. A common form of a bequest is a percentage of one's assets or the residual value of the estate given in your memory or in that of a loved one. You can work with your favorite charity to create a lasting legacy. Your existing Will can be easily amended through a codicil. You can designate AES in your will or trust to receive a bequest upon your death, knowing that you are helping fund our future.

SAMPLE BEQUEST LANGUAGE

"I give, devise, and bequeath to Arizona Elk Society, 7773 W. Golden Lane, Peoria, AZ 85345, EIN: 86-1035639", the sum of \$_____; OR _____% of my estate; OR the following securities, real estate or tangible property _____; OR _____% of the remainder of my estate after specific amounts are bequeathed to other beneficiaries and estate-related expenses are paid.

INSURANCE BENEFICIARY

Policies that are no longer needed to protect your family from financial burdens of your passing can be used to fund your charitable plans by designating one or more of your favorite charities such as AES as the beneficiary. You may be able to transfer ownership of a policy with cash value to AES and receive a charitable deduction. AES will receive the face value of the policy upon your death.



"AES is making Arizona a model state for riparian stream restoration. AES, with their partners, makes great ambassadors of their land."

*Tom Runyon,
Hydrologist,
US Forest Service*



"AES creates an environment where many stakeholders come together and lay down their individual banners for the greater good."

*Craig McMullen,
Arizona Game and Fish
Department*

IRA BENEFICIARY DESIGNATION

Using retirement plan assets to fulfill your philanthropic goals can be far more advantageous than directing these assets to your estate or leaving them to heirs. Distributions from a retirement plan are typically taxable to the recipient if they are not a recognized charitable organization. As you review your estate plan, you may realize that you have an IRA or 401k account that is likely to be significantly impacted by both estate and income taxes. Left to AES, however, IRA gifts can avoid all taxes. Talk to your IRA custodian and make the Arizona Elk Society a beneficiary of your IRA, ensuring that tax-vulnerable gifts pass to your charity, and tax-free gifts go directly to your heirs.

DONOR ADVISED FUND

Perhaps you need a substantial current tax deduction, and want to provide a secure income for your favored charities, including the Arizona Elk Society. Consulting with your tax advisor, you may decide that a Donor Advised Fund administered by a large mutual fund company will give you the vehicle you need for the immediate tax deduction along with the peace of mind knowing that you have provided for the long-term security of your charities. You can fund your gift with appreciated securities for further tax savings. And, your heirs can continue to advise the Fund after your death.





"The amount of manpower that AES brings to a project gives agencies like the US Forest Service an opportunity to do work in one weekend that would take several years with our relatively small work force."

*Tom Runyon,
Hydrologist,
US Forest Service*

GIFTS WITH INCOME

You may be retired and your estate may include a substantial amount of appreciated stock, which provides little income. You would like to increase your available income, and make charitable donations to support Hospice. If you sell the stock, capital gains taxes will reduce the amount available for both purposes.

A charitable remainder trust may be the solution. You can place cash, stock, or other property, such as real estate, in a trust that pays annual income to you and your spouse (or another named beneficiary) for a predetermined amount of time, after which the trust ends and the assets go to Arizona Elk Society. You receive an income tax deduction for the "present value" of the gift to AES.

Charitable Remainder Trusts and similar strategies have significant legal and tax implications, and should be considered by donors in consultation with their legal and tax advisors.

CHARITABLE GIFT ANNUITY

A charitable gift annuity is an irrevocable agreement between you and AES, whereby you donate cash or stock now, gain immediate tax benefits, and receive a fixed and guaranteed income for life for you and/or a loved one.

GIFTS OF PROPERTY

Gifts of privately held securities restricted stock, real and personal property can be used to support AES. Depending on the nature of the property, a charitable intermediary, specializing in these transactions, may be utilized to complete the sale of the property and transfer of the proceeds to a donor advised fund or to the charity directly. The donor's charitable deduction is based on the value of the asset at the time it is contributed.

FINANCIAL ADVISORS

The strategies outlined here have legal and tax implications for the donor, and should be undertaken with the guidance and advice of trusted financial advisors and the AES Director of Planned Giving.

We maintain in our office a listing of attorneys, financial planners, accountants and other professionals who have indicated to us their interest in assisting our donors through the complexities of planned giving in light of the donor's personal circumstances.

In addition, several mutual fund companies have established donor advised charitable funds which can be used as part of a comprehensive financial plan.

You can also call our Director of Planned Giving who can meet with you to discuss all your options at no cost or obligation.

Please let us know how we can help.



"With all the technology kids are bombarded with these days, it's crucial to show these youths that there's a lot more out there if they just put the device down...they realize they have influence and can make a difference. AES Youth programs raise awareness for kids and they literally tap into a different part of their brain."

*Erica Swisher,
Youth Programs
Coordinator,
Arizona Elk Society*



“As a combat wounded veteran, there was something therapeutic about being out in the woods. The fresh air, hiking up mountains, scouting, and tracking, gave me the chance to unwind and escape the stressors of the world.”

*SSgt. Daniel N., USAF
(retired)*

FROM THE ARIZONA ELK SOCIETY

The Arizona Elk Society has achieved remarkable success over the past two decades because of the support of our donors, partners and volunteers. AES serves a unique and powerful role in protecting Arizona’s ecological treasures by managing and repairing its wildlife habitat as well as helping our youth to understand their role in conservation. Since 2001, we have diligently worked to establish a reputation of excellence and integrity and to be recognized as an integral part of the wildlife habitat of Arizona and responsive to its needs.

With the support of people like you, we have achieved that goal. Now we want to ensure that our future will be as bright as our past...that new challenges in conservation will be faced with confidence...that residents of Arizona will always have access to the outdoors that they currently enjoy far into the future.

Consider becoming part of our Legacy Program. Funding our Future...Believing in our Tomorrow.

YOUR LEGACY IS FOREVER

Whether your gift is endowed or for current use, your legacy is forever. A legacy isn't only what you leave to the world. When you add a charity or charities in your estate plan, you create something powerful; a legacy that tells future generations what causes mattered to you. Your action will inspire others to follow your example and make a difference in their own way!

CONTACT US

For more information on giving opportunities, please contact Ron Huddleston at (623) 444-4147 or ron@arizonaelksociety.org.

OR VISIT

arizonaelksociety.org/plannedgiving



Thank you for
considering the
Arizona Elk Society



