LEAVE A LEGACY

WHAT IS A PLANNED GIFT?

Whether you have created a will or not, there is a plan for your assets after you pass. Without a will, your assets will be divided according to state law. A planned gift is a way of conveying your values and supporting the people and organizations you love.

A planned gift is a contribution arranged in the present and allocated at a future date. Commonly donated through a will or trust, planned gifts are most often granted after you have passed. By making a planned gift to Environmental Traveling Companions, you are ensuring the longevity and vitality of the outdoors for years to come.

Sample Bequest Language

You can make an unrestricted gift that allows Environmental Traveling Companions to determine how to use the funds based on the most pressing needs. Or, you can designate your gift for a particular purpose. Use the following language for your will and/or trust:

Unrestricted gifts

“I give to Environmental Traveling Companions, a nonprofit corporation currently located at 2 Marina Boulevard Fort Mason Center, Suite C385, San Francisco, CA 94123 , or its successor thereto, _____ [written amount or percentage of the estate or description of property] for its unrestricted charitable use and purpose.”

Designate your gift for a particular purpose

“I give to Environmental Traveling Companions, a nonprofit corporation currently located at 2 Marina Boulevard Fort Mason Center, Suite C385, San Francisco, CA 94123 , or its successor thereto, _____ [written amount or percentage of the estate or description of property].

This gift should be used for (***state purpose***) if and so long as Environmental Traveling Companions determine that the need exists. If Environmental Traveling Companions shall determine at the outset or at a later time that the need does not exist, or no longer exists or for some reason it is not possible (or prudent) to administer my gift as originally intended, then Environmental Traveling Companions may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above."

We encourage you to seek the advice of your financial or legal advisor to make sure this gift fits your goals.

WAYS TO MAKE A PLANNED GIFT

Gifts that take effect on your passing

Through your will, living trust, retirement plan, or insurance, you can name Environmental Traveling Companions as your beneficiary.

Will or Living Trust

- Name Environmental Traveling Companions (ETC) in your will or trust
- Designate a specific amount, or percentage of your estate, or a particular asset
- Your gift can be cash, stocks/bonds, real estate, or other assets
- You have continued use of these assets during your lifetime
- Flexibility—You may change the bequest at any time
- Your estate receives a charitable tax deduction for the full amount of your bequest

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Retirement Plans or Insurance

- Name Environmental Traveling Companions (ETC) as a beneficiary of your IRA, 401(k) or 403(b) plan, or life insurance policy
- Designate all or a percentage of the proceeds to ETC

- Naming ETC can avoid the significant tax penalties levied when individuals inherit retirement plan funds
- Possible estate tax savings
- Flexibility—You may change the beneficiary designation at any time

Please let us know if you've already included a gift for Environmental Traveling Companions in your will, trust, or as a beneficiary. Providing us with documentation is the best way to ensure that your gift is used in the way you intended. Of course, some of our donors prefer to remain anonymous. Therefore, any inquiries made to ETC will be kept confidential.

Charity Legal Name

Environmental Traveling Companions 2 Marina Boulevard Fort Mason Center, Suite C385
San Francisco, CA 94123
Federal Tax ID Number: 51-0158789
Tax Status 501c3

I'm Here to Help

Contact Liz Bernstein, ETC's Individual Giving Director liz@etcgroups.org or (415) 474-7662 ext 22

Note: The information in this document is not intended as legal or tax advice. For such advice, please consult your attorney or tax advisor.