



Create Your Legacy Through Planned Giving

Featuring Julian & Kathy Donahue

with Julie Schuldner, MBA, CFRE, Sharpe Group Senior
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How to Create your Legacy



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What is a planned gift?

A creative, flexible way to support your loved ones & charity!

Planned gifts are contributions that are:

- Also referred to as estate plans or legacy gifts.
- Established now but distributed at a future date.
- Donated through a will or trust as part of your overall estate plan.

They can be:

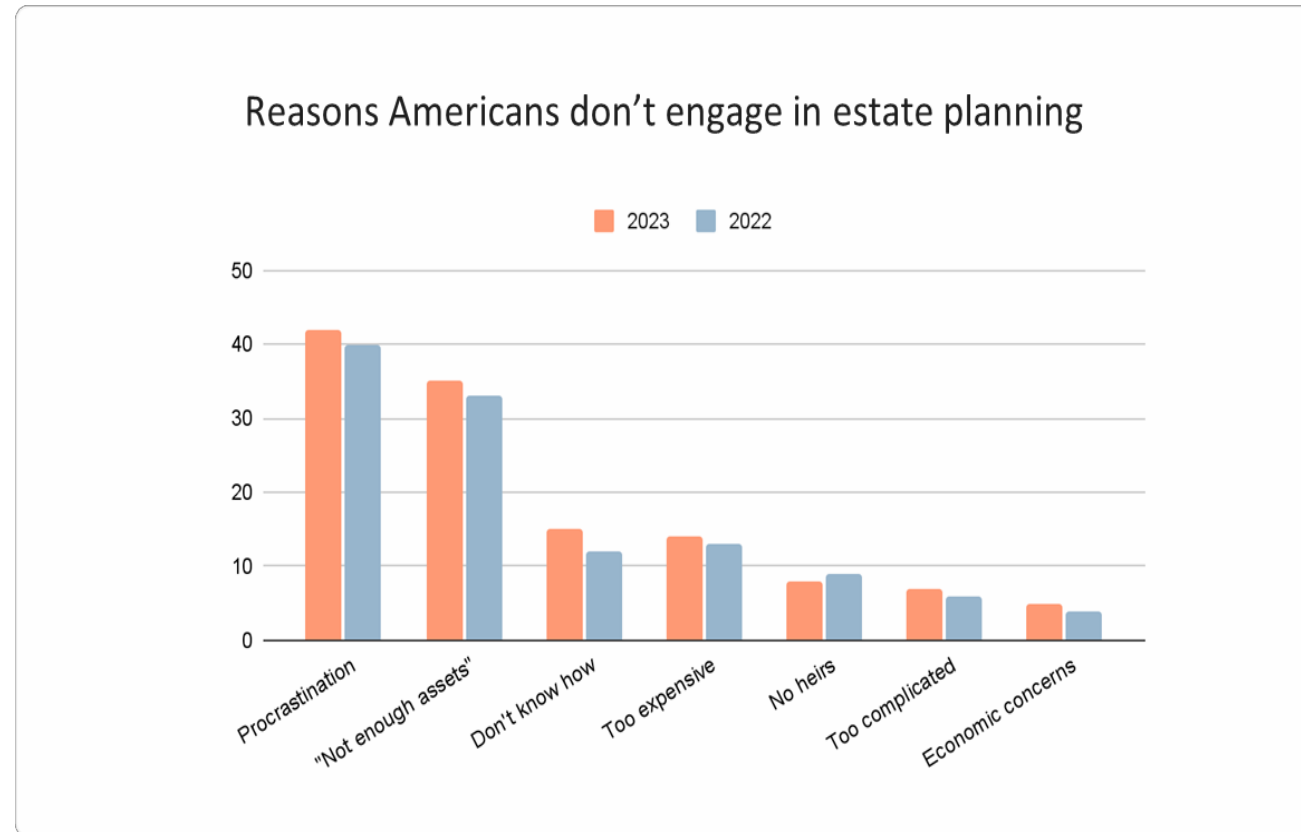
- Funded with a variety of assets, including cash, equities, personal property, or real estate.
- Unrestricted or directed to a specific program or fund.
- Made in honor or in memory of a loved one.

Having a plan is essential to protect your assets and loved ones.

Lays out a clear plan for all your assets.	Defines your wishes for who receives what. Prevents decisions being made by the government.
Protects the people and causes you care about.	Provides for your spouse, children, or other heirs. Supports your favorite charities beyond your lifetime.
Gives you security and peace of mind.	Protects your loved ones and assets, no matter what. Prevents undue burden on your family.

Yet most Americans don't have a plan. Why? Simple procrastination is the #1 reason!

- 64% of Americans believe having a will is important.
- 34% of Americans have a will or estate plan.



What can your legacy gift do?

- Planned gifts make a profound statement of support that:
 - Provides for the causes that matter most to you, like Population Connection.
 - Honors the values that guide your life.
 - Creates a charitable legacy that endures for generations.

Leave a gift in your will – Most common planned gift!

To leave a legacy gift, or bequest, in your will, you allocate a portion of your estate to a nonprofit in your legal will.

Bequests are usually allocated in four ways:

- A percentage of your total assets or estate.
- The remaining value of your assets or estate after all other allocations have been made.
- A specific amount of cash, real estate, or personal property.
- Contingency beneficiary.

More about Bequests

Bequests are fairly easy to establish – and can be changed at any time.

Good for those who:

- Want to make an enduring impact.
- Want to maintain control of their assets during their lifetime.
- Appreciate having a peace of mind that your wishes are being made known.

Beneficiary Designations



For additional assets that might not be included in your will (“non-probate assets”)

Retirement accounts like IRAs, 401(k)s, 403(b)s.
Certain bank and brokerage accounts.
Donor Advised Fund balances.
Life insurance policies.



Easily established through a beneficiary designation form (with your financial institution) – and can be changed at any time



Good for those who:

Don't want to change their will, but also want to make a charitable legacy gift.
Looking for certain tax advantages by leaving a nonprofit as a beneficiary.
Easy to set up and establish.

The Types of Planned Gifts that provide payments for life

- With these types of planned gifts, nonprofits receive an irrevocable gift and make payments to the donor or donors for the rest of their life or lives.
 - Charitable Gift Annuities
 - Charitable Remainder Annuity Trusts
 - Charitable Remainder Unitrusts

Making a plan can be easy and free

To help begin your planned gift, we have partnered with FreeWill to offer you a free online will-writing tool

- Absolutely no cost to you
- Available from the comfort of home
- Quick and easy – just 20-30 minutes to complete
- Creates a legal will customized to your wishes
- Can be paired with an attorney for complex estates

Make your legacy one that protects people and our planet

- Help ensure our work continues as long as overpopulation threatens our world.
- Support the work that matters most to you.
- Please inform us of your gift – and let your generosity inspire others!

Questions!

Thank you for joining us! If we do not answer your question here today, please email us at engage@popconnect.org and we will get back to you as soon as possible!

Thank you!

- For more information about including Population Connection in your estate plans, visit www.popconnect.org/legacy
- You may also go online to create your will for free at www.freewill.com/populationconnection.

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