



Planned and Estate Giving

Your planning now can impact generations.

Planned giving ensures good stewardship of your assets and of nature by providing Stokes Nature Center with the resources needed to deliver more nature education and exploration opportunities for all people so that we may all be better stewards of the world around us.

There are many ways that you can create a lasting gift:

Endowment

An endowment is an invested fund from which an organization receives only the residual income, leaving the principal investment untouched. The principle can continue to mature with gifts from friends of Stokes like you: gifts of cash, property and stock, funds from trusts, annuities or bequests. These can be added to the principle of the endowment.

When your earmarked gift is invested through our endowment, attributed earnings can be disbursed in annual support for Stokes for years to come. That means your donation has a lasting impact even more so than an outright gift intended for immediate needs. This means more children educated, more adults inspired, and more hours spent outdoors enjoying and caring for our natural world.

Named Memorial Endowment

With an initial gift of at least \$100,000, you can choose to establish a named endowment in honor or memory of a loved one. Families, businesses and institutions may choose this option to honor a tradition, recognize an achievement, or show appreciation for friends, loved ones, colleagues or community leaders. This memorial fund creates an ongoing legacy in the name of the person you choose so that your gift can ensure the future of Stokes and the memory of your loved one lives on.

Estate Giving

Gifts by beneficiary designation:

You can help sustain the work of Stokes and our natural world for years when you name SNC as a beneficiary of your retirement account, life insurance plan, bank account or other assets. It is one of the easiest ways to give – it costs you nothing now, does not require a lawyer, and you can choose to change your beneficiaries at any time.

Through a beneficiary designation, you can donate many types of assets, all of which make it possible for the next generation to learn to be better stewards of our planet:

- IRAS, 401ks and other qualified plans
- Life insurance policies
- Certificates of deposit
- Bank accounts
- Personal residence

How do you make this designation? Simply contact the firm that holds your assets and ask them for a beneficiary form to fill out and provide Stokes Nature Center as the recipient.

Making Stokes Nature Center the beneficiary of your retirement plan is another option. It can help to reduce your taxes (please consult a tax professional for advice), but it will simultaneously advance Stokes mission of making nature available to all people.

Benefits to you:

- Reduce or eliminate taxes on retirement assets
- Remove highly taxable assets from your estate by direct beneficiary designation
- Reduce or avoid probate fees
- There is no cost to you now

How you make this possible: Contact your bank or insurance company to see if a beneficiary form must be completed.

Life Insurance Policy gift: Gifting a life insurance policy that has outlasted its purpose can afford you tax savings in your lifetime while funding a legacy gift that changes lives.

Benefits to you:

- Donate ownership of your policy and receive a charitable income tax credit for the market value of the policy
- If you name us a beneficiary while retaining the policy, the proceeds will be paid to Stokes and your estate will receive the tax credit.

Savings Bonds: If you have bonds that have stopped earning interest and you plan to redeem them, you will owe income tax on the appreciation. In the end, your heirs may only receive a fraction of their value. Since Stokes is a tax-exempt institution, naming us as a beneficiary means that 100 percent of your gift goes to making it possible for our next generations to appreciate the natural world that you love.

CDs, Bank Accounts and Brokerage Accounts: Naming Stokes as the beneficiary of any of these is one of the easiest ways to support stewardship of the natural world.

Making a legacy gift in your will or trust is one of the most popular ways to ensure that your love for the natural world is reflected in your legacy. Some of the ways this is possible include:

Residual bequest: a percentage of the remainder of your estate after other specific legacies have been fulfilled is gifted to Stokes.

Specific bequest: a specific dollar amount or stated fraction of the estate or a specified gift in kind is gifted to Stokes.

Contingent bequest: a gift that is originally intended for another beneficiary but, in the event of their prior passing, is redirected as a charitable donation.

Sample Gift Language that you might find helpful:

The following language may help you and your attorney as you draw up a bequest that fulfills the legacy you desire to leave.

- General Bequest: If you would like to leave an outright gift of cash, securities, or other property by designating a particular amount be used for general purposes:
 - o “I, [name], in of [city, state, ZIP], give, devise and bequeath to Stokes Nature Center [written amount or percentage of the estate or description of property] for its unrestricted use and purpose.”
- Specific Bequest: If you would like to make an outright bequest for a specific purpose such as supporting a scholarship fund for preschool students or a community program:
 - o “I, [name], of [city, state, ZIP] give, devise and bequeath to Stokes Nature Center [written amount or percentage of the estate or description of property] for its charitable purposes, including but not limited to _____ use and purpose.
- Contingency Bequest: If you would like to make a contingency gift, Stokes Nature Center will receive a portion of your estate if your named beneficiary does not survive you:
 - o “If any of the beneficiaries named in this will should die before becoming entitled to receive their distributive share of my estate, I direct my trustee to pay or transfer the share to which such beneficiary would otherwise be entitled, to Stokes Nature Center for its unrestricted use and purpose.”

For any of these, please consult with your attorney to be sure your wishes are fulfilled.

And remember... you can always make an immediate gift in support of Stokes Nature Center and its nature education and outdoor exploration at www.logannature.org.