

We're Here to Help You



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Let us know!

Notifying us of your intended gift helps us honor your wishes for using the funds.

National Audubon Society

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www.Audubon.PlanYourLegacy.org

Photos: Cover: Least Tern and chick. Ursula Dubrick/
Audubon Photography Awards. Grandfather and
grandson: iStock. Inside: Snowy Plover chick. Dennis
Goodman/Audubon Photography Awards

Include Audubon in Your Will or Estate

EASY WAYS TO GIVE



Stewardship That Endures

Your support for Audubon reflects what you cherish—the birds and nature that have brought joy to your life, and the vibrant, healthy planet we all depend on.

Leaving a gift to Audubon—by bequest in your will or trust, through an IRA, or other financial account—is a way to ensure that your values endure. It's a way of extending your reach beyond the bounds of time to enrich the lives of future generations. It's a way of honoring your commitment to the natural world with a legacy that will help protect it.

It's an exceptional kind of stewardship.



Donors Choose a Bequest Because

It does not affect assets or cash flow during your lifetime.

You can change the provisions in your will or trust at any time.

There is no minimum gift required; you may leave a gift in any amount.

You can designate your gift to a specific program or activity at Audubon, or leave your gift unrestricted to be used for our highest conservation priorities when we receive it.

Your gift is fully deductible for federal estate tax purposes, and there is no limit on the deduction your estate can claim. In addition, the gift is usually exempt from state inheritance taxes.

Wills and Living Trusts

Many people like to leave a gift to charity in their will or revocable trust, because it is a way to plan for a significant contribution, even if you feel that the time is not right for one today. A charitable gift through your will or trust can factor in your current lifestyle and commitments, and at the same time ensure future support for Audubon and the birds you value.

Including a Bequest in Your Will or Trust

The language below provides a template for including a gift to Audubon in your will. Please contact Audubon's team for additional information. You may also wish to consult with your attorney.

How to Say It

I bequeath _____
(*dollar amount or percent of estate*) to the National Audubon Society, Inc, a not-for-profit organization, with its principal offices located at 225 Varick Street, 7th Floor, New York NY, 10014, for its ongoing environmental conservation and education purposes. Tax ID# 13-1624102.

Retirement Plans

Subject to multiple types of taxes, IRA, 401(k), and other qualified retirement plans are the best—and easiest—assets to leave to charity. You can designate all or a portion of the funds remaining in your plan as a gift to Audubon, and 100% of your gift will help protect the birds you love.

Including Audubon in Your Retirement Plan

- Request or download a beneficiary form from your retirement plan manager.
- Designate Audubon as a partial, contingent, or sole beneficiary of your account.
- If you are married, your state may also require a spousal waiver form, which can be obtained from your account manager.

Other Ways to Provide for Birds

Life Insurance Policies

Life insurance policies that have outlasted their original purpose are a wonderful way to create a conservation legacy. Simply name Audubon as a full or partial beneficiary.

Certificates of Deposit, Bank & Brokerage Accounts

Your financial institution can assist you in the easy process of naming Audubon for a gift of a certificate of deposit, or any other bank or brokerage account. Be sure to provide our Federal Tax ID# 13-1624102 and our legal name: National Audubon Society, Inc.

Donor-advised Funds

Designate Audubon as a successor beneficiary of a portion or all of the funds remaining in your donor-advised account after your lifetime.

Benefits to You

Each of the giving options described in this brochure offers you these benefits:

- You retain control of your assets during your lifetime.
- You can change your beneficiaries if and whenever you wish.
- You can leave a gift in any amount.

Make your love for birds a lasting part of your life story.

