

# LEAVE A LEGACY FOR OUR ENVIRONMENT

Make a gift in your will, trust, or beneficiary designation



**FLORIDA CONSERVATION VOTERS**



**FCV EDUCATION FUND**



## SAVE ON TAXES WITH GIFTS OF RETIREMENT ASSETS

Donating your retirement assets is one of the most tax-wise gifts you can make. Leaving retirement assets to a loved one may reduce the overall size of the gift because of significant taxes. When you donate those assets to the FCV Education Fund, 100 percent of your gift goes to the mission. Many people choose to donate retirement assets to charity and leave other less tax-burdened assets to loved ones.

1700 N. Monroe St. #11-286  
Tallahassee, FL 32303  
Phone: (850) 629-4656

[www.FCVoters.org](http://www.FCVoters.org)  
[www.FCVEDFund.org](http://www.FCVEDFund.org)

## HOW DO YOU WANT TO BE REMEMBERED?

Throughout our lives, there are moments when we pause to reflect on our achievements and at what we have yet to accomplish. These moments, when we contemplate how to leave the world a better place, are among the most important decisions we will ever make.

You have demonstrated a commitment and passion for protecting our living planet. Leaving a gift for the environment can ensure that your values live on for future generations.

A simple gift in your will can help us protect the health of our communities and fight the greatest challenge of our generation, climate change. After all, we have only one Earth and it is our duty to leave it better than we found it for future generations.

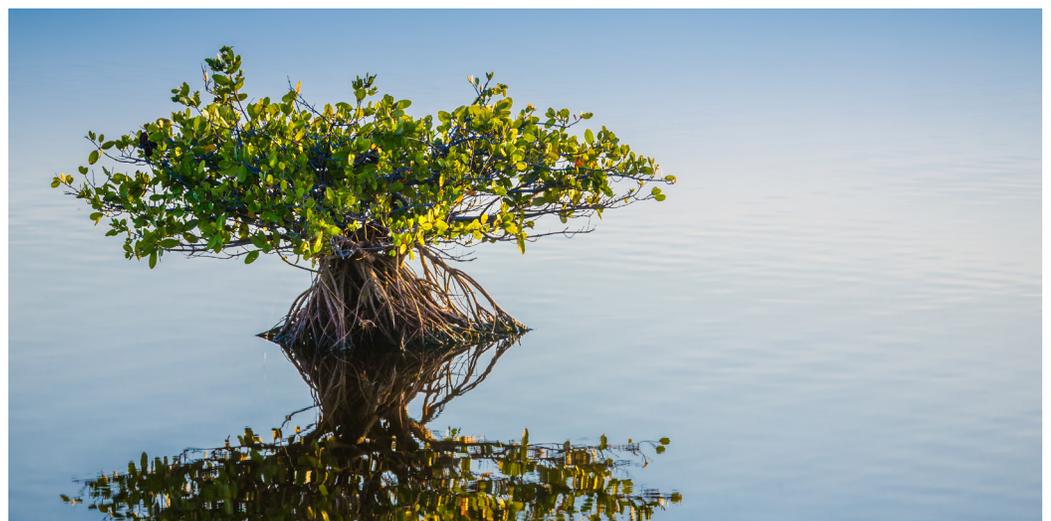
## SIGN YOUR NAME, PROTECT THE FUTURE

**Supporters like you frequently tell us, "I wish I could do more."**

The good news is, there's an easy way to do more. Simply sign your name to leave a gift beyond your lifetime. Include us as a beneficiary on any of these types of accounts:

- Retirement Accounts
- Life Insurance Policies
- Bank or Brokerage Accounts
- Certificate of Deposits
- Donor Advised Funds

It's easy to do. Check your account statement for the phone number and website of your account administrator. Request or download a beneficiary designation form. Designate us as a partial, contingent or sole beneficiary of your account. Then, simply sign and return the form to your plan administrator and keep a copy for your files.



## FOUR ESSENTIAL DOCUMENTS

Here are 4 essential documents you should have in place today and that you and your spouse or partner should review at least annually:

- 1. Will or Trust:** Your will or trust allows you to specify your wishes for your loved ones and how you would like your assets distributed after your lifetime.
- 2. Beneficiary Forms:** Many assets can be passed down without a will, including retirement plan accounts, financial accounts such as brokerage and bank accounts, and life insurance policies.
- 3. Powers of Attorney:** A durable power of attorney for finances and a healthcare power of attorney allow you to name a trusted person to make financial and medical decisions on your behalf if you are incapacitated or otherwise unable to act personally.
- 4. HIPAA Release:** A Health Insurance Portability and Accountability Act (HIPAA) Release Authorization allows you to specify who may have access to your medical information.

## IS IT TIME TO UPDATE YOUR WILL?

For many of us, the task of creating or updating our will or financial documents is one of those “to-dos” we repeatedly move to the bottom of the list. It is easy to ignore these tasks until it is too late—but you owe it to yourself and your family to be prepared.

**To determine if it is time to create or update your will, use this short checklist:**

- |                              |                             |  |
|------------------------------|-----------------------------|--|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Has it been three or more years since you last reviewed your plans?                  |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Have you recently moved to a new state?  |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Has there been a birth or death in your family?                                      |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Has there been a change in your marital status?                                      |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Has there been a change in the circumstances of your executor or beneficiaries?      |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Have you decided to leave a gift for a favorite charity?                             |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Have you entered the workforce or changed jobs and rolled over your retirement plan? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Have any of your children reached adulthood (age 18)?                                |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Are you wondering if tax law changes affect you?                                     |

**If you answered “yes” to any of the questions on the checklist, then it’s time to create or update your will.**

# YOUR LEGACY: A HEALTHY ENVIRONMENT FOR GENERATIONS TO COME

## A GIFT THAT COSTS YOU NOTHING NOW

One of the most popular ways to create a lasting legacy for the environment is by leaving a gift to us in a will or trust.

Your gift will fight the effects of climate change and inspire action for a healthy environment for generations to come. The gift costs you nothing now but allows you to make a significant impact on the future. You can take care of family first and name us to receive a specific amount or percentage of your estate. Or, consider naming us as a contingent beneficiary, so we're next in line after loved ones. Simply discuss your wishes with your attorney and provide our legal name and tax identification number:



Florida Conservation Voters  
Tax ID# 46-0560492

Florida Conservation Voters  
Education Fund  
Tax ID# 33-1024026

## BENEFITS TO YOU

**Giving feels good. But it also has benefits:**

- You retain control of your assets during your lifetime. These gifts cost you nothing now.
- You can change your beneficiaries at any time.
- You can provide for loved ones and help preserve our environment for generations to come.
- You can leave a gift in honor or memory of someone special.
- You choose the amount; there is no minimum contribution required.
- You can remain anonymous, if you choose

## PLEASE LET US KNOW

To notify us of a gift you have left or to discuss how you can be a forever friend of the Earth, please contact us. We're here to help.

**Brittany Melin**  
**Phone: (850) 629-4656**  
**[brittany@fcvoters.org](mailto:brittany@fcvoters.org)**

Gifts to Florida Conservation Voters, a 501(c)(4) nonprofit corporation, are not tax-deductible. Florida Conservation Voters Education Fund is a 501(c)(3) organization, and gifts to FCVEF are tax deductible to the extent allowed by law.

Florida Conservation Voters and the Florida Conservation Voters Education Fund - The information in this publication is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in examples are for hypothetical purposes only and are subject to change. References to estate and income taxes include federal taxes only. State income/estate taxes or state law may impact your results.

**1700 N. Monroe St. #11-286**  
**Tallahassee, FL 32303**  
**Phone: (850) 629-4656**

**[www.FCVoters.org](http://www.FCVoters.org)**  
**[www.FCVEdFund.org](http://www.FCVEdFund.org)**