

# How to leave a legacy of environmental protection right here at home

Feel free to share <u>this printable document</u> with your attorney or financial advisor. Need additional information, a list of estate planners in your area, or to notify us of your planned gift? Contact <u>cynthia.satterfield@sierraclub.org</u>.

We offer both charitable and non-charitable gift options. You may choose one or both. Either way, 100% of your gift will be used to protect North Carolina's environment for future generations. Read on to learn more about these options.

# **Non-Charitable Bequests**

Contributions to the Sierra Club-North Carolina Chapter, a 501c4 political advocacy organization, are not tax-deductible. But, these gifts are a good option if your estate exceeds the current allowable limit for charitable contributions or you simply want to support our legislative lobbying, voter registration or other political advocacy efforts.

To make a non-charitable bequest, use EIN# 94-1153307 and specify the "North Carolina Chapter of Sierra Club" as the beneficiary. Please use the following language:

I give \_\_\_\_\_ [amount or percentage] to Sierra Club, Tax ID 94-1153307, a California nonprofit corporation, currently located at 2101 Webster Street, Suite 1300, Oakland, California, 94612 (Attention: Gift Planning Program), to be used by Sierra Club's North Carolina Chapter for the protection of the environment. In the event that the North Carolina Chapter (or its successor) ceases to exist as a Sierra Club entity, then the Board of Directors of Sierra Club shall have sole authority in administering the funds.

## Other Non-Charitable Gifts

- Cash gifts can be made out any time to the "NC Chapter of Sierra Club" or "NC Sierra Club" and mailed to the NC Sierra Club at 19 W. Hargett Street, Suite 210, Raleigh, NC, 27601.
- Stock gifts can be made by completing and returning this form.

### **Charitable Bequests**

If a tax-deduction is desired, gifts can be made to the Sierra Club Foundation-North Carolina Chapter, a 501c3 charity. These gifts can be used to educate the media or general public about important environmental issues, ensure that the Executive Branch and state agencies implement existing environmental law, or to conduct policy research and analysis.

To make a charitable gift, use EIN# 94-6069890 and specify the "Sierra Club Foundation-North Carolina Chapter Fund" as the beneficiary. Use this language:

I give \_\_\_\_ [amount or percentage] to the Sierra Club Foundation, Tax ID 94-6069890, a California nonprofit corporation, currently located at 2101 Webster Street, Suite 1250, Oakland, California, 94612 (Attention: Gift Planning Program), to support the charitable activities of Sierra Club's North Carolina Chapter. In the event that the NC Chapter (or its successor) ceases to exist as a Sierra Club entity, then the Board of Directors of the Sierra Club Foundation shall have sole authority in administering the funds.

#### Other Charitable Gifts

- Cash gifts can be made out to the "Sierra Club Foundation- North Carolina Chapter" and mailed to the NC Sierra Club at 19 W. Hargett Street, Suite 210, Raleigh NC 27601.
- Stock Gifts can be made by completing and returning this form.

Gifts can also be made to the North Carolina Chapter of the Sierra Club through donor-advised funds, life insurance policies, and retirement distributions.

While not required, we ask that you <u>notify us if you intend</u> to make a planned gift so that we can offer guidance and appropriately direct your gift to North Carolina.