

Planned Giving and Bequests Are Vital

Bequests are a vital and continuing resource that strengthens the Sierra Club's ability to preserve our natural heritage for future generations. Most donors plan their gifts in the form of a general-use gift. This general support is the most helpful to us because it allows us to direct funds to our most crucial conservation priorities.

However, should

you have a specific environmental or programmatic interest, or if you wish to establish an endowment, we would be happy to assist you in planning a gift that meets your interests and the long-term goals of the Sierra Club and the Santa Lucia Chapter.



**WHAT WILL YOUR
LEGACY BE?**

Ensure your environmental legacy by naming Sierra Club or your favorite Sierra Club chapter in your will or trust. These gifts cost you nothing now. You can hold on to your assets for as long as you need them and you can change your beneficiaries at any time.

If you have named Sierra Club or your Chapter as a beneficiary or would like to discuss doing so, please contact us today

LORI SULLIVAN
Director of Gift Planning
2101 Webster St, Suite 1300
Oakland, CA 94612

(800) 932-4270
gift.planning@sierraclub.org
myplan.sierraclub.org

 **SIERRA CLUB**
GIFT PLANNING

Bequests to the Santa Lucia Chapter

Bequests to the **Santa Lucia Chapter** support conservation work in SLO County. This funding enables the Chapter to continue to protect the natural splendor of the Central Coast for years to come. Planned Gifts are particularly important to the Chapter as they can provide significant resources to allow continued conservation activities over an extended period of time. Bequests to the Sierra Club Santa Lucia Chapter are not tax deductible, but charitable (tax-deductible) bequests can be designated to the Santa Lucia Chapter through the Sierra Club Foundation.

National Sierra Club and the Sierra Club Foundation

Bequests to the National Sierra Club can fund national and regional lobbying activities. This support is particularly valuable because legislation is usually the final step in formally establishing national parks and wilderness areas, setting standards for clean

water and air, protecting our precious coastlines, and achieving other environmental goals. Because lobbying is not a charitable activity, bequests to the National Sierra Club are not tax-deductible for estate tax purposes.

Consider the Benefits of a Life Income Gift

If you are planning a bequest, you may wish to consider the financial benefits of a life income trust. Many people have realized significant advantages by using a major portion of a planned bequest for the establishment of such a trust. If you would like to see how a life income trust might benefit your specific situation, the Planned Giving Office would be happy to prepare a financial analysis for you. Information is also available to you on how a Charitable Gift Annuity or Charitable Remainder Trust can benefit both you and the Sierra Club.

Further Information: If you have any questions about planning a bequest for Sierra Club or the Sierra Club Santa Lucia Chapter, or if you are interested in learning more about life income trusts and other deferred gifts, please contact Lori Sullivan at (800) 932-4270, or email gift.planning@sierraclub.org.