



# GIFTS BY BENEFICIARY DESIGNATION

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## FOR A HEALTHY PLANET TOMORROW, SIGN YOUR NAME TODAY

Humanity is totally dependent on nature. Our food, our water, our health, our jobs—they all rely on the health of the planet's ecosystems. With your support, Conservation International protects nature and our work creates powerful ripple effects that will impact the earth for many generations to come.

Several of our supporters tell us they would like to be remembered as someone who cared for the earth. We would like to thank them and you for considering a gift of this magnitude and impact. To make nature part of your lasting legacy today, it's as easy as signing your name.



### HOW YOU BENEFIT

- Your gift costs you nothing now. You retain control of your assets during your lifetime.
- You can change your mind at any time and modify your gift if circumstances change.
- Your gift can remain anonymous if you choose.
- Your gift may allow you to save on taxes or reduce the tax burden for your heirs.
- You will be remembered as someone whose legacy led to a healthier, more prosperous, and more productive planet for today and for future generations.



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### Please tell us about your gift!

If you leave a legacy gift to Conservation International, please contact Mallory Henig at 800-406-2306 or [mhenig@conservation.org](mailto:mhenig@conservation.org). We would love to say thank you and to ensure that your wishes are carried out. Plus, your gift can inspire others to remember Conservation International in this meaningful way.

## HOW IT WORKS

It's easy to leave a gift by beneficiary designation. Simply name "Conservation International Foundation" as a beneficiary, or partial beneficiary, of any account such as:

### RETIREMENT PLAN ACCOUNT (SUCH AS AN IRA)

This is one of the most tax-wise gifts you can make. Most retirement plans are taxed differently than other funds. By leaving those gifts to Conservation International and to your family, you can do more for the earth and your loved ones.

### CERTIFICATES OF DEPOSIT, BANK AND BROKERAGE ACCOUNTS, AND LIFE INSURANCE POLICIES

Consider naming Conservation International as a beneficiary of a certificate of deposit, other bank or brokerage account, or a life insurance policy you no longer need.

### DONOR-ADVISED FUNDS

Many people have chosen to name Conservation International as the beneficiary of donations remaining in their donor-advised fund after their lifetime.



**It's easy! Just follow these simple steps to complete your gift by beneficiary designation:**

1

Request a beneficiary form from your bank or plan administrator. The form may be available online. This form—not your will—determines how these assets are distributed after your lifetime.

2

Write in "Conservation International Foundation" as beneficiary [or partial beneficiary] using our current business address: 2011 Crystal Drive, Suite 600, Arlington, Virginia 22202.

3

If the form requests a social security number, use our tax identification number: 52-1497470.

4

If you, or your plan administrator, have any questions, please don't hesitate to contact us.

### We're Here to Help

We are honored that you would consider leaving your legacy with Conservation International, helping protect nature for the benefit of all. Please let us know if we can help you decide on a gift that's right for you. To notify us of a legacy gift you have planned, or to discuss the best gift option for you, please contact Mallory Henig at 800-406-2306 or by email at [mhenig@conservation.org](mailto:mhenig@conservation.org).

This information is general in nature and is not intended as legal or tax advice.

Prospective donors are urged to consult an attorney, financial or other professional advisor for such advice.

# GIFTS ESTATE PLANNING CHECKLIST AND BEQUEST

## IS IT TIME TO CREATE OR UPDATE YOUR WILL?

### Information to help you decide

Most of us know we need to create or update our will, living trust or other important documents. But the task always seems to move to the bottom of our “to do” list. It is truly one of the easiest things to take care of. You owe it to yourself and those you love to be prepared. And you will feel so good knowing it’s done.

To determine if now is the time to create or update your plans, review this short list. If you answer “yes” to any of the questions on this checklist, it’s time to plan for your family’s future.

**YES    NO**

- |                       |                       |                                                                                   |
|-----------------------|-----------------------|-----------------------------------------------------------------------------------|
| <input type="radio"/> | <input type="radio"/> | <b>Has it been three or more years since you last reviewed your plan?</b>         |
| <input type="radio"/> | <input type="radio"/> | <b>Have you retired, changed jobs, or made changes to your retirement plan?</b>   |
| <input type="radio"/> | <input type="radio"/> | <b>Have you recently purchased or sold a home or business?</b>                    |
| <input type="radio"/> | <input type="radio"/> | <b>Has there been a birth or death in your family?</b>                            |
| <input type="radio"/> | <input type="radio"/> | <b>Have your children reached adulthood (age 18)?</b>                             |
| <input type="radio"/> | <input type="radio"/> | <b>Has your health or the health of a loved one changed?</b>                      |
| <input type="radio"/> | <input type="radio"/> | <b>Has there been a change in marital status for you or any of your children?</b> |
| <input type="radio"/> | <input type="radio"/> | <b>Have you recently moved to another state?</b>                                  |
| <input type="radio"/> | <input type="radio"/> | <b>Have the circumstances of your executor or beneficiaries changed?</b>          |
| <input type="radio"/> | <input type="radio"/> | <b>Have you decided to leave a gift for a favorite charity in your plan?</b>      |

## GIFTS IN YOUR WILL

### How Will You Be Remembered?

Conservation International empowers societies to care for nature and protect the well-being of humanity for generations to come. Many of our supporters have created a lasting legacy for the earth by leaving a gift to Conservation International in a will or trust. We would like to thank them and you for considering a gift of this magnitude and impact. It's a wonderful way to be remembered for your commitment to nature.

Your gift costs you nothing now but allows you to play a significant role in caring for nature and all of humanity for generations to come.

### HOW YOU BENEFIT

- 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 play a role in protecting our planet's future.
  - You can leave a gift in honor or memory of someone special.
  - You choose the amount; there is no minimum contribution required.
  - Your gift can remain anonymous if you choose.
- .....

### We're Here to Help

We are honored that you would consider leaving your legacy with Conservation International, helping protect nature for the benefit of all. Please let us know if we can answer any questions you may have about leaving a gift in your will, trust or other estate planning documents. To notify us of a legacy gift you have planned, or to discuss the best gift option for you, please contact Mallory Henig at 800-406-2306 or by email at [mhenig@conservation.org](mailto:mhenig@conservation.org).

### USING THE RIGHT WORDS

**We suggest the following language for a gift in your will to Conservation International.**

"I give to Conservation International Foundation, whose national office address is 2011 Crystal Drive, Suite 600, Arlington, VA 22202, (Tax ID# 52-1497470) \_\_\_\_\_ % of the rest of my estate (or \$\_\_\_\_\_) in support of its mission."





# GIFTS IRA ROLLOVER

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## SAVE NATURE AND SAVE ON TAXES

### Charitable IRA Rollover

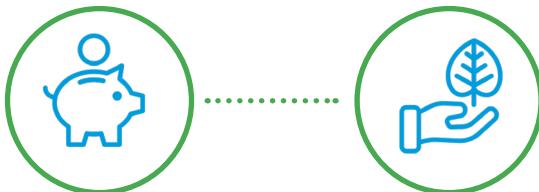
Conservation International empowers people to care for nature to protect the well-being of humanity. Millions of people have invested in our work to protect nature for future generations. With new tax rules, if you are over age 70 ½, you can make tax-free donations to qualified charities, such as Conservation International, directly from your Individual Retirement Account (IRA).

Your gift counts toward your required minimum distribution and comes with tax benefits that many of our supporters find valuable as they manage their retirement resources.

We would like to thank you for considering a gift of this magnitude and impact.

### HOW IT WORKS

It's easy! Simply notify your IRA plan administrator of your intention to make a gift directly to Conservation International, making sure to provide our address and a contact name. They will then handle everything else for you.



### HOW YOU BENEFIT

- You receive tax savings even if you don't itemize deductions on your taxes.
- Conservation International will provide you with a letter acknowledging receipt of your gift for your tax files. Because the funds go directly to charity, you don't have to pay taxes on the distribution.
- Your IRA rollover donation counts towards your required minimum distribution and is a great choice if you do not need the cash.
- You feel good knowing you are protecting nature and creating a powerful ripple effect that will impact the earth for many generations.

## CONSIDER A GIFT FOR LATER

Not ready to make a gift today? Please consider naming Conservation International as a beneficiary of your account. Your gift costs you nothing now and you retain control of your assets during your lifetime.

**Just follow these simple steps to complete your gift by beneficiary designation:**

- 1** Request a beneficiary form from your bank or plan administrator. The form may be available online. This form—not your will—determines how these assets are distributed after your lifetime.
- 2** Write in “Conservation International Foundation” as beneficiary [or partial beneficiary] using our current business address: 2011 Crystal Drive, Suite 600, Arlington, Virginia 22202.
- 3** If the form requests a social security number, use our tax identification number: 52-1497470.
- 4** If you, or your plan administrator, have any questions, please don’t hesitate to contact us at the number below.

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### We're Here to Help

We are honored that you would choose to leave your legacy with Conservation International helping protect nature for the benefit of all. Please let us know if you would like to make a gift to Conservation International from your IRA, please direct your administrator to send the check to Conservation International, Attention: Mallory Henig, 2011 Crystal Drive, Suite 600, Arlington, VA 22202.



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For more information about this tax-smart way of giving or to discuss the best gift option for you, please contact Mallory Henig at 800-406-2306 or by email at [mhenig@conservation.org](mailto:mhenig@conservation.org).