



# American Forests Evergreen Society

## Easy Ways to Make Forests Part of Your Legacy

### YOUR FOREST LEGACY

You can make healthy and resilient forests part of your enduring legacy and help protect and restore forests for generations to come. You may be surprised to learn that there are many ways to create your legacy that:

- Cost you nothing now.
- Give you flexibility and are personalized to your needs and goals.
- Require no minimum. We welcome legacy gifts in any amount.
- Enable you to take care of your loved ones while also championing forests as part of your personal legacy.

The following are some of the easiest ways to create your legacy.

### A GIFT FROM YOUR WILL OR TRUST

A gift from your will or trust is the most common way to ensure that your support of American Forests continues beyond your lifetime and benefits future generations. Three simple options for this type of bequest include:

- In addition to your loved ones and other beneficiaries, you may name American Forests to receive a specific amount or percentage of your estate.



- To leave American Forests what's left over after your loved ones are provided for, use a residuary bequest, which leaves the remainder of your estate to charity.
- To leave your estate to American Forests if your family and friends or other named beneficiaries predecease you, use a contingent bequest. This is often used by spouses who stipulate that if the other spouse is no longer living, then the bequest specified for that spouse will go to American Forests.

To ensure that your gift reaches us, use the following language and legal designation:

**“I give to American Forests, (EIN 53-0196544), a nonprofit corporation currently located at 1220 L Street, NW, Suite 750, Washington, DC 20005, or its successor thereto, \_\_\_\_\_ [written amount or percentage of the estate] for its unrestricted use and purpose.”**

## RETIREMENT PLAN ASSETS

Most retirement plans are subject to income and possibly estate taxes when transferred to loved ones, other than your spouse. Because we are a tax exempt nonprofit, when you designate American Forests as a beneficiary of your retirement plan, 100% of your gift will go to protecting and restoring forests. When you make a gift to American Forests directly from a retirement plan, you can:

- Leave other, less heavily taxed assets to your loved ones.
- Change your beneficiaries at any time, retaining maximum flexibility.
- Create your legacy without the expense of an attorney. Simply request a change of beneficiary form from your plan provider and include American Forests as a full or partial beneficiary.

## LIFE INSURANCE

A life insurance policy that has outlived its purpose may be the perfect vehicle for leaving a gift to American Forests. Simply ask your insurance company for the appropriate forms to make American Forests the owner or beneficiary of the policy. You may also name us as a contingent beneficiary, so the policy passes to American Forests only if your family members predecease you. Please check with your attorney or financial planner for more information.

## DONOR ADVISED FUNDS

When determining what will happen to assets remaining in your donor advised fund (DAF) after your lifetime, you can name American Forests as one of the ultimate beneficiaries of your DAF, ensuring your legacy for the future of forests. You can also designate that American Forests receives a portion of the account value, leaving the remaining balance for your children or grandchildren to continue your legacy of philanthropy.

## CDs AND OTHER FINANCIAL ACCOUNTS

One of the simplest ways you can help ensure American Forests' future is by making American Forests the Pay on Death (POD) or Transfer on Death (TOD) beneficiary of a certificate of deposit, or any bank or brokerage account. Your financial institution can assist you with this easy process to leave an impactful bequest.

## AT YOUR SERVICE

For more information or assistance in crafting your personal legacy, please contact our Planned Giving team:

**[plannedgiving@americanforests.org](mailto:plannedgiving@americanforests.org) | (202) 737-1944**

If you have already made a gift to American Forests in your will, trust or by beneficiary designation, please let us know. We would like to recognize your generosity by welcoming you as a member of our Evergreen Society, which offers special benefits for those who include American Forests in their estate plans. By letting us know, we can ensure that your wishes are carried out as you intended.



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