

**I AM INTERESTED IN OPTIONS FOR PLANNED AND TESTAMENTARY GIFTS**

- I am just beginning my estate planning, and would like to speak further about my situation, so that I can determine the best charitable outcome.
- I have made provisions for Greenbelt in my will or estate plans. Please include me as a member of the Greenbelt Legacy Society.
- I would like to speak to someone regarding other options for making testamentary gifts, including options for receiving quarterly income distributions for the rest of my life.
- I will be selling real estate in the near future. I would like to learn more about ways that I could make a charitable contribution to Greenbelt in conjunction with the sale of my home, seasonal property, or other real estate.
- I would like to speak to someone regarding conservation options for my land.

*Greenbelt strongly recommends that you consult your attorney, financial or tax advisor, and/or estate planner when establishing or revising your estate plans.*

**PLEASE CONTACT ME**

Name

Address

Day Phone

Evening Phone

Email

*Please return this form in the enclosed envelope and we will be happy to contact you regarding your interests.*



Essex County Greenbelt  
82 Eastern Avenue  
Essex, MA 01929  
978 768 7241  
ecga@ecga.org

[www.ecga.org](http://www.ecga.org)



**Conserving local farmland, wildlife habitat, and scenic landscapes.**



# Legacy Giving

## Leaving a Lasting Legacy

Your planned gift to Greenbelt creates a lasting legacy.

Many options are available to help realize your financial goals while your gift protects the landscapes you love.

## Many Paths to a Lasting Legacy

Whatever your stage in life, financial resources and charitable goals, you can make a meaningful gift to Greenbelt that complements your personal circumstances and honors your passion for the landscape and its natural wonders.

Today, there are many paths to a lasting legacy. The charitable gifts you can make range from simple to more complex. They can include the gift of a tangible asset, a gift that returns income, or a gift that costs nothing during your lifetime. Greenbelt and your trusted professional advisors can help you determine the best way to provide a legacy gift to local land conservation that meets your specific personal, financial and philanthropic goals.



**Peter and Barbara Haack**  
Charitable Gift Annuitants | 2004

Landscape photos: Jerry and Marcy Monkman/ecophotography.com  
Egret photo courtesy of Adrian Scholes



A Legacy or Planned Gift is any major gift, made during or at the end of your lifetime, as part of your overall financial or estate planning.

Your Legacy Gift to Greenbelt can be funded using cash, appreciated securities, real estate, artwork, personal property, life insurance, or retirement plans. The financial and tax benefits of each gift type will generally depend on your age, current financial circumstances and philanthropic interests.



GREENBELT  
**LEGACY**  
SOCIETY

**Greenbelt Legacy Society**  
Recognizing Your Generosity

The Greenbelt Legacy Society has been created to recognize those generous individuals who establish planned and life income gifts to Greenbelt, including gifts through the GreenTrade Program.

Members of the Legacy Society help lead the way and set the tone for creative and innovative philanthropy on behalf of Greenbelt's mission.

Have you already made a bequest to support the future of Greenbelt's land conservation work? If so, please let us know your plans so we can thank you and ensure your wishes are met.

LEARN MORE ONLINE

[www.ecga.org/legacy](http://www.ecga.org/legacy)

## Your Legacy Gift Options at a Glance

	Planned Gift	Typical Donor	Donor Benefits	Tax Advantages	Eligibility
<b>Gifts of Assets</b>	<b>Personal Assets</b> <i>Fully Appreciated</i>	Donor of any age with tangible assets.	Simple to complex depending on gift type. Funded with cash, marketable securities, tangible property or real estate. Real estate donation made via our Green-Trade Program reduces responsibilities associated with property ownership.	Receive a charitable deduction for the full market value of the asset. Pay no capital gains tax on the transfer.	No minimum age or gift amount.
<b>Life Income Gifts</b>	<b>Charitable Gift Annuity</b>	Older donor seeking increased income and secure, fixed payments.	Secure, stable, guaranteed annual or quarterly payments. Easy to implement. Fund with cash or marketable securities.	Charitable income tax deduction in year of gift. No income tax liability until payments begin. Favorable capital gains treatment for gifts of appreciated securities.	Minimum Gift Amount: \$10,000 Minimum Age of Beneficiary: 55
	<b>Deferred Gift Annuity</b>	Younger donor seeking a current tax deduction who wants to supplement future income.	Secure, stable, guaranteed payments at a future date. Fund with cash or marketable securities.	Charitable income tax deduction in year of gift. No income tax liability until payments begin. Favorable capital gains treatment for gifts of appreciated securities – deferred to future date.	Minimum Gift: \$10,000 Minimum Age: 50
	<b>Charitable Remainder Unitrust</b>	Seeks flexibility with payment options and terms. Wants to avoid capital gains taxes on gifts of appreciated securities or other property. Is considering a gift of real estate and wishes to receive income in exchange for the gift.	Variable income for life or a term of years. Income determined by percentage of market value each year. Flexibility to meet income needs. Fund with cash, marketable securities, closely held securities or real estate. Professional investment management.	Charitable income tax deduction in year of gift. No capital gains tax on transfer of assets. Potential estate tax savings.	Minimum Initial Gift: \$100,000 Minimum Age: 55
	<b>Charitable Remainder Annuity Trust</b>	Seeks flexibility with payment options and terms. Wants to avoid capital gains taxes on gifts of appreciated securities or other property. Is considering a gift of real estate and wishes to receive income in exchange for the gift.	Fixed income for life or a term of years. Fund with cash or marketable securities. Professional investment management.	Part of your gift is tax-deductible. Avoid capital gains taxes on appreciated assets donated to the trust.	Minimum Initial Gift: \$100,000 Minimum Age: 55
<b>Gifts Accepted After Your Lifetime</b>	<b>Simple Bequest</b>	Donor who anticipates having accumulated assets at the time of his or her death.	Simple and flexible - make changes any time. Retain use of assets during your lifetime. Designate a percentage of your estate, a specific amount, or a particular asset.	Federal estate tax deduction for amount of bequest.	Intention must be declared in a will or other testamentary document.
	<b>Beneficiary Designation</b> <i>Retirement Plan or Life Insurance Policy</i>	Donor who wants to maximize the value of his or her unused retirement plan or life insurance assets.	Easy to implement – usually requires a simple form. Qualifying retirement accounts include IRA, 401(K), Keogh account.	Federal estate tax deduction for amount of gift. No income tax liability for other beneficiaries of your estate. 100% of the gift is disbursed directly from custodian to Greenbelt.	Anyone with a qualified retirement plan or IRA or life insurance policy.