



Your Legacy – Audubon’s Future

Audubon has a vision for and is investing in conservation in America. For more than a century, we have built a legacy of conservation success by mobilizing the strength of our network of members, Chapters, Audubon Centers, state offices, and dedicated professional staff to connect people with nature and the power to protect it.

A powerful combination of science, education and policy expertise combine in efforts ranging from protection and restoration of local habitats to the implementation of policies that safeguard birds, other wildlife and the resources that sustain us all—in the U.S. and Across the Americas.

What Will Your Legacy Be?

Have you considered making a bequest to support the causes that you have cared about throughout your lifetime? If you share Audubon’s values and feel a personal responsibility for stewardship for our natural world, please consider extending your support beyond your lifetime by including Audubon in your plans.



The George Bird Grinnell Society

Audubon created the Grinnell Society to recognize individuals and families who have named Audubon in their will or estate plans, or who have made a deferred gift to the organization. When you share your commitment to conservation and education, we will enroll you in the Society, which includes a number of benefits, including a yearly copy of Audubon’s Annual Report, an Audubon Calendar, and invitations to special events and trips.

Every Bequest Makes a Difference

Bequests have been critical sources of support for Audubon since the beginning of our movement.

- A modest bequest left by New Jersey schoolteacher Lillian Annette Rowe enabled Audubon to purchase land and protect birds along Nebraska’s Platte River – today, the Rowe Sanctuary is a vital “refueling stop” for 80% of the world’s Sandhill Cranes.
- Nancy Owen left her home to Audubon, stipulating that proceeds from its sale benefit a state program she had seen in action.
- Donna O’Neill made a bequest to Audubon’s Starr Ranch in California, enabling the Starr Ranch Sanctuary to maintain and expand its programs for conservation and education.

From nationwide conservation efforts including Gulf Coast and Mississippi River Initiatives, to state programs and Audubon Education Centers in local communities, planned gifts – of all sizes - can have a profound impact on the vital work we do.

Address: 227 Varick Street, 7th Floor – New York, NY 10014
Phone: 212-979-3033 **Website:** www.audubon.org **Email:** plannedgifts@audubon.org

Plan Your Legacy

What Should My Next Steps Be?

Everyone has different goals – yours may be to make a gift for Audubon’s future that doesn't affect your current cash flow or portfolio. Perhaps you would like to reduce high tax liabilities, or generate additional income for yourself. Maybe you have an overlooked asset that can benefit Audubon without impacting your other plans for heirs. We encourage you to consider the following giving techniques to find one right for you:

- **Include a bequest to Audubon in your will** – even a small percentage of your estate can make a big difference for wildlife and for people!
- **Name Audubon as a beneficiary of your IRA or other qualified retirement plan** – because doing so is a good way for your heirs to avoid income and estate taxes. To name Audubon as a beneficiary of the assets remaining in your IRA, 401(k), 403(b), Keogh, or other qualified retirement plan, you should request a beneficiary designation form from your plan sponsor and share a completed copy with your attorney.
- **Make a charitable gift annuity, which pays guaranteed income for life.** Audubon’s investment record with annuities is proven safe and reliable, and your gift is protected from changes in market conditions and interest rates.
- **Donate a paid-up life insurance policy which has outlived its original purpose,** and receive a current tax deduction.
- **Make a gift through a charitable remainder trust to earn income for life or for a specific term** – one of the most flexible ways to give, with a variety of options.
- **Donate appreciated real estate that is not subject to a lien or mortgage.**

For Your Attorney ~

- The following language will be helpful in preparing your will:
I bequeath _____% of my residuary estate (or \$ _____) to the National Audubon Society, Inc., a not-for-profit organization, with its principal offices located at 225 Varick Street, 7th Floor, New York, NY 10014, for its ongoing environmental conservation and education purposes (or “for programs in the state of _____”).
- Our tax ID # is 13-1624102 and your lawyer should also include this information.
- Our legal name is National Audubon Society, Inc.
- Audubon is a tax-exempt not-for-profit organization as described in sections 170(b)(1)(A)(vi) and 501(c)(3) of the Internal Revenue Code. Gifts and bequests are deductible for income, gift, and estate tax purposes.

Don't keep it a secret!

Once you have named Audubon in your will, retirement plan, or another method, please tell us so that we can list you as a member of the Grinnell Society, our program honoring those making planned gifts to Audubon.

Ready to know more? Contact us for additional information, or for assistance in determining which type of gift may be right for you.

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