

5 GREAT WAYS TO LEAVE A LEGACY



Your support of the ACLU reflects your values—a passion for justice and equality and a desire to make a lasting difference in our country. Leaving a gift to the ACLU is a wonderful way to ensure that your values live on beyond your lifetime.



Nick Burchell/ACLU

1

LEAVE A GIFT THAT COSTS YOU NOTHING NOW

Consider leaving a gift in your will or trust to the ACLU. You can take care of family and friends first and donate a specific dollar amount or a percentage of your estate. Simply provide your attorney with our official name and tax identification number. For specific language visit www.aclu.org/bequestlanguage.

2

DONATE RETIREMENT ASSETS

Because retirement plans are taxed differently than other funds, they can be the least favorable way to leave a gift to loved ones. Leaving retirement assets to a charity is easy and you don't need a will. Simply update your beneficiary designation form with your plan administrator.

Over, please →

5 WAYS YOU BENEFIT Most giving opportunities allow you to:

- Retain control of your assets during your lifetime
- Change your beneficiaries at any time
- Provide for loved ones *and* the ACLU
- Make your gift in honor or memory of someone special
- Leave a gift of any size



“

I've been an ACLU member for 30 years, and am especially passionate about their work on reproductive and voting rights. I'm not a rich guy, but when I found out about leaving a gift, it seemed like a good fit for me.

Making a gift was incredibly easy to do.”

—DOUG WEBBER

3

DONATE A LIFE INSURANCE POLICY YOU NO LONGER NEED

You can update the beneficiaries of your insurance policy at any time by simply requesting a new form from your insurer. You can name the ACLU to receive the whole amount or a percentage.

4

DIRECT YOUR DONOR ADVISED FUND

You can name the ACLU Foundation as a beneficiary of whatever is left in your donor advised fund after your lifetime. As with retirement accounts and life insurance, it's as easy as updating your beneficiary form.

5

MAKE A GIFT THAT PAYS YOU INCOME FOR LIFE

If you are age 60 or older, you can help secure your retirement with a charitable gift annuity. In exchange for your gift of cash or stock to the ACLU Foundation, you receive fixed payments for life at attractive rates, while securing a partial tax-deduction, if you itemize. It's also a wonderful way to provide for loved ones.

WE'RE HERE TO HELP

Leaving a gift to the ACLU is also a wonderful way to honor and remember someone who inspired your passion for liberty. To discuss your goals or notify us of a legacy gift you have planned, please contact us.



Mohammad Zaidi, Director of Gift Planning, American Civil Liberties Union

125 Broad Street, 18th Floor, New York, NY 10004

Web: aclu.org/legacy • Toll-free phone: 877-867-1025 • Email: legacy@aclu.org

Tax ID#: 13-3871360

ACLU

LEAVE A GIFT BY SIGNING YOUR NAME

For over 100 years, generations of ACLU supporters have played a personal role in establishing the freedom we enjoy today.

We invite you to join this proud group of supporters. Here are **two easy ways** to protect freedom by simply signing your name.

BENEFITS TO YOU

- ✓ 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 personal role in protecting our freedom'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,

1 A GIFT IN YOUR WILL

Leaving a gift in your will is the most popular way to create a legacy with the ACLU. Many people tell us how easy it is and appreciate that it costs them nothing now.

You can leave a gift to the ACLU by creating a new will, revising your current will at any time, or by writing an amendment. Here are a few key planning ideas you might want to consider:

Stay flexible by using percentages: For example, "I leave 10% of my estate to the ACLU."

Know for sure by naming a fixed dollar amount: For example, "I leave \$50,000 to the ACLU."

Put your family first: For example, "If my partner survives me, then I leave my entire estate to my partner. If my partner does not survive me, then I leave my estate as follows..."

Over, please >

USING THE RIGHT WORDS

We suggest the following language for a gift in your will to the ACLU.

"I give to the American Civil Liberties Union, Inc. a District of Columbia nonprofit corporation that is recognized as exempt from tax under Section 501(c)(4) of the Internal Revenue Code of 1986, as amended, with its principal offices at 125 Broad Street, New York, New York, [all (or ____ percent) of my residuary estate] or [the sum of \$_____] to be used for its general purposes.

The tax ID# of the American Civil Liberties Union is 13-3871360.



The ACLU protects our rights across so many areas—free speech, privacy, LGBTQ, health care, reproductive rights, and more.

We're glad to be a part of the ACLU's work on the front lines. ”

—WENDY & ANDREA

2

A GIFT WITHOUT A WILL

ACLU supporters like you frequently tell us, “I wish I could do more.” One way you can do more to protect and defend our constitutional rights is by naming the ACLU as a beneficiary. Include the ACLU as a beneficiary of any of these types of accounts:

1. Retirement Accounts
2. Life Insurance Policies
3. Bank or Brokerage Accounts
4. Donor Advised Funds

It's easy to do and you don't even need a will. Just update your policy at any time by requesting a beneficiary designation form from your account administrator. You can designate the ACLU as a partial, contingent or sole beneficiary of your account. Simply complete the form and mail it back, keeping a copy for your files.

To designate a gift to the ACLU simply provide the legal name and taxpayer identification number on your provider's beneficiary designation form as follows:

American Civil Liberties Union, Inc. • Tax ID#: 13-3871360

Gifts to the ACLU are not tax-deductible. However, you can support our work with a tax-deductible gift in your will or by beneficiary designation to the ACLU Foundation. For tax-deductible information, please visit: www.aclu.org/deductible-bequest.

WE'RE HERE TO HELP

To notify us of a gift you have left to the ACLU or to discuss the best gift option for you, contact us. We're here to help.



Mohammad Zaidi, Director of Gift Planning, American Civil Liberties Union

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Web: aclu.org/legacy • Toll-free phone: 877-867-1025 • Email: legacy@aclu.org

Tax ID#: 13-3871360

ACLU

This information is not intended as tax or legal advice. We recommend you consult with your legal and financial advisors to learn how a gift would work in your circumstances. The ACLU Foundation does not issue annuities to residents of Alabama, Hawaii, or Tennessee.



CREATE YOUR LEGACY AND SUPPORT THE ACLU

Join with other ACLU supporters on the Giving Docs platform to plan your legacy. It's free for life for our supporters.

FEATURES AT A GLANCE

Giving Docs provides a full suite of estate planning tools



Will
(Start Fresh)



Codicil
(Update existing Will)



**Beneficiary Designation
Assistance**



**Durable Power
of Attorney**



**Advanced Healthcare
Directive**

Go to aclu.org/givingdocs to get started now!

The ACLU is pleased to offer its supporters free access to an estate planning service through Giving Docs. Giving Docs, an independent third-party platform, makes it simple to support the loved ones and causes you care about most.

**Together – with your planning for the future – we can build a world
that is more just, free, and fair.**



“All our lives, we wanted to do something that has an impact which will last beyond our lifetime — and that’s what a bequest gift to the ACLU can accomplish. We feel good knowing we share the same values and that their work will benefit not only our generation, but the next generation.”

— WENDY & ANDREA, ACLU LEGACY DONORS

**Create your own bequest gift like Wendy and Andrea
by going to aclu.org/givingdocs**

**Curious to know
more? Here are
some answers to
a few frequently
asked questions.**

What is a will?

Your last will and testament is a formal document that specifies your wishes when you pass away.

What is Giving Docs?

Giving Docs is a tool that makes it simple to create a will to support the loved ones and causes you care about most.

Why am I receiving this offer?

You are a valued member of the ACLU and we appreciate all the support you provide to uphold our democracy and the U.S. Constitution.

How can this be offered free of charge?

So many of the ACLU’s members choose to provide for a future gift that we’re able to offer Giving Docs for free.

How do I know Giving Docs is right for me?

The standard will you create through Giving Docs incorporates typical estate planning needs. If you have more complex assets, we recommend consulting an attorney and/or financial advisor.

**For more information,
visit aclu.org/givingdocs
to review additional FAQs.**

While the ACLU covers the cost of providing this service to our supporters, Giving Docs is an independent third-party platform, completely separate from the ACLU. Its services are provided without review from ACLU, and ACLU is not liable for its use. Giving Docs is not a law firm and does not provide legal advice. Your use of the platform is subject to Giving Docs’ Terms of Service, available at www.givingdocs.com/tos, which we encourage you to review.

A GIFT THAT PAYS YOU INCOME



A **charitable gift annuity** allows you to donate to the ACLU Foundation today and receive income payments for the rest of your life. And best of all, your gift will support the ACLU's work of protecting and defending our constitutional rights for generations.



FIVE WAYS YOU BENEFIT

1

ENJOY ATTRACTIVE PAYMENT RATES

Charitable gift annuities continue to be extremely attractive, with rates as high as 10.1%.

2

RECEIVE PAYMENTS THAT NEVER GO DOWN

Your payment rate is based on your age at the time you establish your gift annuity and will never change.

3

LOWER YOUR TAXES

Charitable gift annuities offer a charitable income tax deduction in the year you make your gift, if you itemize. And if you use appreciated stock or mutual fund shares, you can also save on capital gains taxes.

4

PROVIDE INCOME FOR OTHERS

Charitable gift annuities are flexible and can be set up so that payments are made to either one or two beneficiaries so you can provide for a spouse, family member, or friend.

5

CHOOSE WHEN YOUR PAYMENTS BEGIN

You can begin receiving payments immediately or defer them to a later date, such as when you retire, to obtain a higher payment rate.

WHAT THE EXPERTS SAY

“

In growing numbers, philanthropic advisers are trumpeting gift annuities as a win-win proposition, because they let donors support their favorite causes and get a decent income stream in return.

”

—SMARTMONEY MAGAZINE



“

I grew up knowing that the ACLU was going to be there to protect my civil liberties. As soon as I heard about receiving fixed payments for life with a Charitable Gift Annuity, I started my first one. I am not wealthy, but have lived frugally and am very proud that I can support the ACLU in this way. It feels good to know that I can be part of the ACLU forever.”

—MONA FIELD

RATES UP TO 10.1%

The ACLU Foundation offers attractive payout rates based on the recommended rates of the American Council on Gift Annuities. Rates depend on the age of the beneficiary and whether the annuity benefits one person or two. You must be at least age 60 to create an immediate annuity.

Age	Rate	Annual Payment*
70	6.3%	\$1,260
75	7.0%	\$1,400
80	8.1%	\$1,620
85	9.1%	\$1,820
90+	10.1%	\$2,020

*based on \$20,000 gift benefiting one person

IT'S AS EASY AS 1, 2, 3

- 1 **Make** a gift to the ACLU Foundation of \$10,000 or more after you have reviewed a personalized illustration.
- 2 **Receive** fixed payments for the rest of your life or the lives of up to two people you choose. The amount of these payments will never change and you receive a charitable income tax deduction this year, if you itemize.
- 3 **Enjoy** the satisfaction of knowing your gift benefits you now and the ACLU Foundation later to protect and defend the constitutional rights of everyone in this country.

SEE YOUR BENEFITS

For a no-obligation, customized gift annuity illustration based on your age, number of beneficiaries, and when you would like your payments to begin, please visit aclu.org/annuity or contact:



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ACLU
AMERICAN CIVIL LIBERTIES UNION
FOUNDATION

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Bequest Intention Form



Thank you for your generous bequest to the ACLU.

Please use this form to share details about your future gift. We understand that your gift is revocable and that you may change your plans at any time.

Name (Print)		Date
Address		
City	State	Zip
Email		Phone

- I have included the ☐ ACLU ☐ ACLU Foundation* as a beneficiary of my:
☐ Will/Living Trust ☐ Retirement Plan ☐ Savings Account ☐ Life Insurance Policy
- ☐ My bequest is in the specific amount of: \$ _____
OR
☐ My bequest is a percentage worth approximately: \$ _____
(Please provide your best estimate of the value of your future gift, based on the approximate current value of your assets.)
☐ I wish to keep the value of my bequest private.
- ☐ My gift is contingent on the prior death of a spouse or partner.
☐ My spouse/partner has done the same. The ACLU will receive a gift upon the second-to-die.

Recognition

☐ I would like to be recognized as:

(Most listings are first and last name(s). For example, Anna Sanchez or Anna and James Sanchez.)

☐ My recognition can include listing my name within a dollar range.

☐ I want to keep my gift private. Please list me as **Anonymous**.

Please return to:
ACLU Gift Planning
125 Broad Street, 18th Floor
New York, NY 10004

For questions or more information:
aclu.org/legacy
877-867-1025
legacy@aclu.org

*Learn more about the difference between the ACLU and the ACLU Foundation at: aclu.org/bequestlanguage