PCL OVERVIEW &
PLANNED GIVING OPTIONS

Planning and Conservation League
Planning and Conservation League Foundation

Since 1965, PCL has changed the landscape of California through supporting measures that have preserved its iconic forests, coastlines, mountains, and watersheds. We support policies and legislation that protect our environment, and we work to promote open space, habitat, and healthy communities. We invite you to join us in our mission to restore California's wilderness and to defend the public health and safety of the people of California through legislative action.

The League is comprised of individuals, community, agency and business partners, who share our same beliefs and values about protecting the environment and California's natural resources. Our successes are fueled by the generosity we receive from supporters like you.

In order to improve and maintain our environment for current and future generations we need your continued support. We encourage everyone who shares our values to consider a planned charitable gift to PCL.

DECIDING ON A PLANNED GIFT

Planned giving requires not only forethought, but also consultation with your tax advisor and/or attorney. In order to know if a planned gift is right for you, your family and your financial future there are several questions you should ask yourself.

- What are my goals?
- How can I achieve my goals?
- Is there a charitable organization that my goals align with?
- Do I make this gift while I am alive or include it in my estate planning?

Depending on the type of gift, some can be given during your lifetime or others through your estate.

SELECTING THE RIGHT PLANNED GIFT

Planned giving isn't something done overnight because there are steps required by both the donor and recipient. We recommend deciding to whom you want to give, what you want to give (cash, real estate, stocks), and who will get what. Thinking through these plans is important and you may want to consider having one or more family members review the plan. Once you've determined the details, your will and related documents must be signed and it is helpful to notify the recipients of your decision.

OPPORTUNITIES FOR PLANNED GIVING

Once you've gone through this process, your outline can serve as a road map to your planned gift. There are many types of planned giving opportunities. If you decide that your goals align with the work of the Planning and Conservation League, and we hope they do, you may want to consider a few planned giving options:

- Bequests
- IRA Qualified Charitable Distributions
- Charitable Lead Trust
- Gift Annuity
- Charitable Remainder Unitrust
- Gifts of Stock
- Life Insurance
- Trotten Trust

Learn more about these options on the reverse side.

"The Planning and Conservation League has done great work protecting our environment. I was delighted by the opportunity to leave proceeds from my estate to an organization to which I have long felt affection and gratitude, as it represents some of my deepest values."

– Jake Sigg

PLANNED GIVING OPTIONS

CONTINUED

BEQUESTS

When writing a will or living trust, you may include the Planning and Conservation League as a beneficiary. The specific bequest can range from a stated amount to a specific asset, or a percentage of the estate, among other things. This gift may be in cash, securities, real or personal property.

IRA QUALIFIED CHARITABLE DISTRIBUTIONS

Qualified Charitable Distributions (QCD) provide an opportunity to support the PCL Foundation and may help reduce your income taxes by lowering your adjusted gross income. The QCD rule allows traditional individual retirement account (IRA) owners to deduct their required minimum distributions on their tax returns if they donate the money to a 501(c)3.

CHARITABLE LEAD TRUST

A lead trust is the converse of a charitable remainder trust. A donor transfers property to the lead trust, which pays a percentage of the value of the trust assets, usually for a term of years. At the end of the trust term (not to exceed 20 years), the remaining assets in the trust and any growth it has realized are passed to your heirs. It is one of the only transfer devices currently used that can discount the value of the original assets and result in little or no taxes.

GIFT ANNUITY

With gift annuities, a donor irrevocably transfers money or property to a charitable organization in return for our promise to pay you - the donor, another person, or both - fixed and guaranteed payments for life. In essence, the transfer is part charitable gift and part purchase of an annuity income for life.

CHARITABLE REMAINDER UNITRUST

Money, property or both are transferred by the donor to a trustee, often times to a charity. The trustee then invests or reinvests the assets in a separate fund. The donor and/or other designated beneficiary receives an amount each year determined by multiplying a fixed percentage (at least 5%) by the fair market value of the trust assets, valued each year. On the beneficiary's death, payments terminate and the unitrust assets go to the trustee.

GIFTS OF STOCK

Gifts of stock allow you to transfer publicly traded stock to the Planning and Conservation League. This is one of the more common types of planned giving.

LIFE INSURANCE

Many individuals carry life insurance policies. You have the option to name the Planning and Conservation League as a beneficiary of the insurance policy. The League may receive all of the proceeds or a percentage of the proceeds.

TOTTEN TRUST (A BANK ACCOUNT)

Donors may choose to establish a bank account, with the proceeds going to a named survivor, like the Planning and Conservation League, upon the death of the person who opened the account. During the donor's lifetime, they receive any interest from the account and may choose to withdraw from or deposit to the account. Any money in the account on death goes to the named survivor.

Please contact us today, if you'd like to established a planned gift with the Planning and Conservation League. Call our Executive Director to learn more at (916) 822-5631.