



## How to Include Equal Rights Advocates in Your Will or Trust

Thank you for considering a gift to Equal Rights Advocates in your will or living trust. A charitable bequest offers these main benefits:

- **Simplicity.** Just a few sentences in your will or trust are all that is needed. Share the sample bequest language for Equal Rights Advocates with your estate planning attorney:

I give and bequeath to Equal Rights Advocates, Tax ID #: 237217027, the sum of \$\_\_\_\_\_ (or \_\_\_\_\_% of my estate, or \_\_\_% of the rest and remainder of my estate).

- **Flexibility.** Because you are not actually making a gift until after your lifetime, you can change your mind at any time.
- **Versatility.** You can structure the bequest to leave a specific item or amount of money, make the gift contingent on certain events, or leave a percentage of your estate to us.
- **Tax Relief.** If your estate is subject to estate tax, your gift is entitled to an estate tax charitable deduction for the gift's full value.

*To discuss the good your future gift could accomplish at Equal Rights Advocates, please contact Lara Morgan at 415-575-2395 or [lmorgan@equalrights.org](mailto:lmorgan@equalrights.org)*

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### Bequests

To make a charitable bequest, you need a current will or revocable living trust. By including Equal Rights Advocates in your will, you can ensure that your generosity will continue in perpetuity. Equal Rights Advocates pledges to put your gift to the best possible use by protecting and advocating for the rights of women and girls at school and the workplace.

Your gift can be made as a percentage of your estate—"I give, devise, and bequeath to Equal Rights Advocates of San Francisco, California, \_\_\_\_\_% of my estate to be used for its charitable purposes". Or you can make a specific bequest by giving a certain amount of cash, securities or property—"I give, devise, and bequeath to Equal Rights Advocates of San Francisco, California, \$xxx,xxx to be used for its charitable purposes". You can also make a gift of residue. A residue is that assets remain after other bequests have been granted—"All the residue of my estate, including real and personal property, I give, devise, and bequeath to Equal Rights Advocates of San Francisco, California, to be used for its charitable purposes".

*Note: The above wording is suggested. Please consult your attorney when preparing any legal document.*



### **Putting Your Family First**

When planning a future gift, it's sometimes difficult to determine what size donation will make sense. Emergencies happen, and you need to make sure your family is financially taken care of first. Including a bequest of a *percentage of your estate* ensures that your gift will remain proportionate no matter how your estate's value fluctuates over the years.

### **Is This Gift Right for You?**

In general, a charitable bequest works for anyone who would like to support Equal Rights Advocates in the future. Because you can change your mind at any time and make your gift in relative proportion to bequests to family and friends, this type of gift has universal appeal.

### **Profile of a Giver**

- You want to support Equal Rights Advocates after your lifetime.
- You have a will or living trust, or are ready to create one.
- You are young or old, wealthy or middle class.
- You want to make a charitable gift while ensuring family is taken care of first.
- You want to maintain the flexibility to change your mind at any time.
- You want estate tax relief.

### **We Can Help**

Contact Director of Development Lara Morgan at 415-575-2395 or [lmorgan@equalrights.org](mailto:lmorgan@equalrights.org) with any questions about naming Equal Rights Advocates in your will or living trust.