

LEAVING A LEGACY

Including the League of Women Voters of Wisconsin, Dane County in your estate plan will achieve goals that matter to you:

- Further the ongoing work of the league through voter education and registration.
- Express your gratitude and appreciation to a leader or leaders for all that they have contributed to the work of the league.
- Memorialize a loved one with a significant gift that will live on to do good things in their name.
- Recognize a special event such as an anniversary or the number of years of membership you or others celebrate.
- Make a contribution that also will provide tax benefits for your own investments.
- Make a contribution that will not compromise your own financial security.



LEAGUE OF WOMEN VOTERS OF WISCONSIN, DANE COUNTY

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LEAGUE OF WOMEN VOTERS OF WISCONSIN, DANE COUNTY

FUNDING OPPORTUNITIES



www.lwvdanecounty.org

PLANNING FOR THE FUTURE OF THE LEAGUE OF WOMEN VOTERS OF WISCONSIN, DANE COUNTY

The League of Women Voters is a non-profit, non-partisan national organization, open to men and women, whose purpose is to promote informed and active participation of citizens in government at all levels.

Like government, the league functions on several levels—local, state, regional and national. The local league is funded both by member dues and by contributions that enable public-minded citizens to help support its work.

The League of Women Voters of Wisconsin, Dane County retains only one-fifth of its member dues while the rest goes to fund the state and national levels of the organization. Your planned gift will provide an important ongoing source of income. It will help ensure that the vital mission of the League of Women Voters of Wisconsin, Dane County will continue for years to come!



OPPORTUNITIES FOR GIVING

Codicil – If you already have a will, you can add an amendment to it called a ‘codicil’ to designate the addition of the League of Women Voters of Wisconsin, Dane County as a recipient. A new will is not necessarily needed but it is important to formalize the changes with an attorney rather than adding a hand-written note.

Banks, Brokerages – Leaving a gift to a non-profit is as easy as filling out a card at the bank, credit union or brokerage, naming a primary or secondary beneficiary for the contents of the account. It is a quick and easy way to leave funds or CDs to the League of Women Voters of Wisconsin, Dane County.

Home, Real Property – Wisconsin allows putting a label on real property such as a home or cabin through a form filed with the County Register of Deeds. It states that “I/we own this property and upon my/our death, it passes to (Person of Choice) or the League of Women Voters of Wisconsin, Dane County.” No will is required and this bequest will not go through probate court at the time of death. It is necessary to check that the correct language for doing this is stated in the deed.

Life Insurance – For a current policy, you can name as a primary or secondary beneficiary the League of Women Voters of Wisconsin, Dane County. Accounts left to individuals are subject to income taxes but there is no tax penalty when they are left to a qualified 501(c)(3) non-profit

organization. It also is possible to purchase a policy with the intent of making the League of Women Voters of Wisconsin, Dane County the beneficiary.

Living Trust – This is a trust document that sets up a distribution plan for the assets placed in it. You can be your own trustee or another person can be named trustee to make distributions during your lifetime, including some or all to the League of Women Voters of Wisconsin, Dane County.

Charitable Remainder Trust – This would allow for a transfer of property you have to a trust with you as the beneficiary now and the remaining balance paid to the League of Women Voters of Wisconsin, Dane County at the time of death with no tax penalty. Such trusts commonly are used for stocks, mutual funds or real estate.

Note: Information included in “Opportunities for Giving” comes from Attorney Melinda Gustafson Gervasi and her book: *Middle Class Philanthropist: How Anyone Can Leave a Legacy*, published in 2013.