Where there's a will, there's a way ...

To support laws that are compassionate, just and respectful of the inherent worth of every individual.

As a supporter of the Friends Committee on Legislation of California and the FCL Education Fund, you've demonstrated that you care about our mission. You want your voice and your values to have a presence in Sacramento.

But what happens to your support when you pass on? If you remember FCLCA or the FCLCA Education Fund in your will or revocable trust you leave a legacy that proclaims your faith that we'll continue to do work that you value, far into the future.

By making a provision for a bequest in your will or revocable trust, you demonstrate that you want to make a difference, not just now but in the years to come. You recognize that a voice of conscience will always be needed — wherever decisions are made that affect people's lives — and FCLCA can provide



that voice at the State Capitol. You believe it is important to educate and involve the public in a meaningful, active way. And you believe that we must be guided by compassionate values and concern for every person, even if that means taking an "unpopular" position.

Why Should You Include a Charitable Gift in Your Will (Or Living Trust)?

- 1. It's simple to do. It can be as easy as including language stating, "I give \$20,000 to the Friends Committee on Legislation of California."
- 2. You can change your mind. During your lifetime, you can amend anything you choose, i.e., beneficiaries, amounts, etc.
- 3. Tax-wise, it could be beneficial. Gifts to qualified charitable organizations such as the FCL Education Fund reduce the value of your estate for estate tax purposes.
- 4. It's an easy way to support FCLCA or the FCL Education Fund, and we'd be grateful for your gift. Bequests of every size build our future financial strength. A number of recent bequests have allowed FCLCA to remain strong and grow in these difficult economic times.

How you include a gift in your will or revocable trust) depends on what you want to accomplish, and what you want to give to FCLCA or FCL Education Fund. Here are some options:

- 1. **Give a percentage of the residue of your estate** the amount left after taxes and expenses are satisfied and specific bequests have been paid; e.g., "I give 25% of the rest, residue, and remainder of my estate to the FCL Education Fund, located in Sacramento, California."
- 2. **Give a specific dollar amount or item of property;** e.g., "I give Friends Committee on Legislation of California \$25,000"; or "I give Friends Committee on Legislation of California, located in Sacramento, California, 100 shares of IBM stock."

3. **Make your bequest** *contingent*; e.g., "I give Friends Committee on Legislation of California, located in Sacramento, California, \$25,000 if my niece and nephew predecease me."

Besides choosing how your bequest will come to us, you also have a say in how it will be used and acknowledged here:

- Make the gift unrestricted, so that we may use the gift where there is the greatest need or invest it to provide a source of continued funding;
- Make the gift restricted, i.e., to support a specific area of interest, such as subsidizing newsletters for prisoners;
- Memorialize or honor a loved one "This gift is made in memory of my loving husband, a founder of FCLCA."

What if you have already written a will?

You can instruct your attorney to add a simple, inexpensive codicil to your will and include a bequest to FCLCA or the FCL Education Fund. This can be a specific amount of money or a percentage of your estate.

We can provide you with more information on FCLCA and FCL Education Fund, their legal name and tax I.D. numbers, as well as suggested wording for the various bequest types and methods mentioned above. This information can assist your attorney in finalizing your will. It is always advisable, of course, to consult your own professionals, such as an attorney or CPA, when considering a bequest or planned gift. **FCICA**

If a gift through your will (or living trust) is of interest, please contact us.

Kevan Insko Director of Development and Outreach Friends Committee on Legislation of California (916) 443-3734 <kevan@fclca.org>

This article is intended to provide general gift planning information. Our organization is not qualified to provide specific legal, tax or investment advice, and this publication should not be looked to or relied upon as a source for such advice. Consult with your own legal and financial advisors before making any gift. Copyright @2008, PlannedGiving.com.