

## URBAN ECOLOGY CENTER LEGACY SOCIETY

### WAYS TO MAKE A GIFT THROUGH YOUR ESTATE

#### Gift/ Bequest in a Will or Living Trust

This type of gift can provide an exact dollar amount or a percentage of your estate to the Urban Ecology Center. The gift can specify use for general purposes or for a purpose dear to your heart, for example, environmental education.

Gift language can be simple, for example: *I give and bequeath to the Urban Ecology Center of Milwaukee, Wisconsin (\$ dollar amount) (percent of estate) for its general use and purposes (or for a particular purpose you prefer).* That's all you need to say. It helps to include our legal name, address, and federal ID number.

#### Gift from an IRA, Other Retirement Account, or Life Insurance

You can make the Urban Ecology Center a full or partial beneficiary of a life insurance policy or retirement account. Just complete a Change of Beneficiary Form, which you can get from your Account Manager or find on the institution's website.

If you are 70 ½ years or older, you may give part or all of the Required Minimum Distribution from your retirement account directly to the Urban Ecology Center. This enables you to avoid paying taxes on those funds.

Usually, no lawyer or notary public is necessary, but you might want to check with your Account Manager or financial advisors.

#### Gift from a Charitable Trust

Charitable trusts set aside a certain amount of money to be given to charities, while providing current income and/or tax benefits to the donor. They can be complicated and require professional assistance to be created. However, they can provide significant benefits to a donor with substantial assets.