

# PLAN AHEAD



Your Gift		Your Goal	How You Make the Gift	Your Benefits
Simple Gifts Anyone Can Make	Your Will or Trust A Beneficiary Designation	<ul style="list-style-type: none"> <li>Defer a gift until after your passing.</li> <li>Maintain control of your assets during your lifetime</li> </ul>	<ul style="list-style-type: none"> <li>Work with your attorney to add bequest language in your will or living trust detailing your donation to Galapagos Conservancy.</li> <li>Designate Galapagos Conservancy as beneficiary of a percentage of your retirement plan, savings, or brokerage account or life insurance policy.</li> </ul>	<ul style="list-style-type: none"> <li>Maintain your current lifestyle while making a meaningful gift to support Galapagos Conservancy.</li> <li>Enjoy flexibility to change your plans as life changes.</li> <li>Pass your retirement plan assets to Galapagos Conservancy tax-free.</li> </ul>
Gifts of Assets	Stock or Other Securities Real Estate † Personal Property †	<ul style="list-style-type: none"> <li>Make a gift now and receive benefits.</li> <li>Make a larger gift with little or no effect on cash flow.</li> </ul>	<ul style="list-style-type: none"> <li>Give stock or securities that have increased in value directly to Galapagos Conservancy.</li> <li>Donate your residence, farm, or commercial property.</li> <li>Donate tangible personal property such as art, collectibles, or other items of value.</li> </ul>	<ul style="list-style-type: none"> <li>Receive immediate income tax benefits.</li> <li>Avoid capital gains taxes on assets that have increased in value.</li> <li>Transfer the expense of insuring or maintaining assets you no longer need.</li> </ul>
A Gift That Pays You	Charitable Gift Annuity *	<ul style="list-style-type: none"> <li>Supplement your retirement income with steady payments.</li> <li>Receive payments that are partially income tax-free.</li> </ul>	<ul style="list-style-type: none"> <li>Make a donation of cash or securities to benefit Galapagos Conservancy through a simple exchange for fixed payments for life.</li> </ul>	<ul style="list-style-type: none"> <li>Receive current <i>and</i> future savings on income taxes.</li> <li>Enjoy tax savings on a portion of each payment you receive throughout your life expectancy.</li> <li>Receive fixed payments for life.</li> <li>What is left of your gift after your passing support Galapagos Conservancy.</li> </ul>
A Flexible Gift That Pays Income	Charitable Remainder Unitrust Charitable Remainder Annuity Trust	<ul style="list-style-type: none"> <li>Supplement your own retirement income or that of someone else with a charitable remainder trust.</li> </ul>	<ul style="list-style-type: none"> <li>You transfer cash, securities, or other appreciated property into a charitable remainder trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to you, or another beneficiary if you choose, for a lifetime or a term up to 20 years. When the term is up, the balance goes to Galapagos Conservancy.</li> </ul>	<ul style="list-style-type: none"> <li>With a charitable remainder trust, you can make a generous gift to Galapagos Conservancy, receive and immediate income tax deduction for the charitable portion of your gift and eliminate the capital gains tax at the time of the gift when the trust is funded with appreciated assets.</li> </ul>
Gifts That Reduce Gift and Estate Taxes on Assets You Pass to Family	Charitable Lead Unitrust Charitable Lead Annuity Trust	<ul style="list-style-type: none"> <li>Provide a revenue stream to Galapagos Conservancy with a charitable lead trust.</li> </ul>	<ul style="list-style-type: none"> <li>You transfer securities or other appreciating property into a charitable lead trust. The trust pays either a variable (unitrust) or fixed (annuity trust) amount each year to Galapagos Conservancy for a lifetime or a term of years. The balance then passes to your heirs.</li> </ul>	<ul style="list-style-type: none"> <li>Support Galapagos Conservancy during your lifetime, reduce your taxable estate, and, often, reduce gift taxes with the charitable lead trust.</li> </ul>

† Gifts of Real Estate and Personal Property are accepted on a case-by-case basis. Please check with Galapagos Conservancy before designating a gift of Real Estate or Personal Property.

\*Charitable gift annuities are not available in all states. Please contact us if you are interested in a gift annuity.

**Find a plan that's right for you.** Thank you for considering a gift to help support our efforts to protect the unique biodiversity and ecosystems of Galapagos. We understand you support our work because you believe in what we do and want to help make a difference to conservation. But we would also like to make sure you benefit from making a gift to Galapagos Conservancy. How does this happen? You may be surprised to learn that many gift types offer significant financial and tax benefits.

### You Have Options

You are probably familiar with outright gifts, such as cash or check, which you make today and we can use right away. But sometimes an immediate gift is not the best option, especially if you feel unsure about giving up assets today that you and your family might need in the future.

A planned gift is a perfect solution to this problem. There are many types of planned gifts and each offers unique advantages. Some planned gifts are revocable – a gift in your will or living trust, for example – so you can change your mind any time.

Or, they can be irrevocable – just as outright gifts are – so that you benefit from an immediate income tax reduction.

Irrevocable planned gifts are attractive because they are deferred. You part with an asset today, but the actual giving of the asset to us is put off – often until after your lifetime (and that of a surviving beneficiary, if you wish). Until then, you enjoy the benefits of the gift.

For example, with a charitable remainder trust, you receive lifetime income from the asset after it is placed in a trust, and then Galapagos Conservancy will receive the remainder of the trust after your lifetime. Or, you could deed Galapagos Conservancy the remainder interest in your home and still retain the right to live in it for life. † The key feature of planned gifts like these is that they provide important benefits to you as well as Galapagos Conservancy.

### Learn More

We have designed the gift options chart to summarize the benefits of several common charitable gifts. Just think of what you want to accomplish with your gift and there is probably a way to do it!

We are here to answer any questions you might have about planned giving. We can, with your attorney and/or financial advisors, help you find ways to support our mission while ensuring your family's financial security.



Waved Albatross  
Photo by Vincente de Baca

If you would like to learn more about including Galapagos Conservancy in your will, we would be happy to answer any questions and assist you in your planning – please give us a call.

### The Galapagos Legacy Society

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Fairfax, VA 22030

[www.galapagos.org/donate-page/planned-giving-legacy-society/](http://www.galapagos.org/donate-page/planned-giving-legacy-society/)

### Join with Other Supporters to Increase Your Impact

Over the years, supporters like you have selflessly given their time, talent, and assets to protect Galapagos. Each contribution has allowed us to sustain a growing level of support that secures our long-term financial stability.

If you feel strongly about our work and would like to join with other supporters who share your values, we hope you'll consider joining the Galapagos Legacy Society.

If you have already made a planned gift to support Galapagos Conservancy, please let us know so that we can properly thank you and welcome you into the Galapagos Legacy Society.



Sea Lions with Kicker Rock and Evolution  
Photo by Chris Harter