



Planning Your Legacy The “Four P’s”

Planning to create your Will or Living Trust doesn’t have to be difficult or time consuming. Follow these “Four P’s” to get started.

- 1. PROPERTY** — List your assets (*your home, investments, savings, insurance and retirement plans*) and your liabilities (*mortgages, loans and credit card debt*) along with their current estimated value or cost.
- 2. PEOPLE** — List the individuals and charitable organizations you’d like to provide for in the future.
- 3. PLANS** — Match your property with the people and charitable interests in your life.
- 4. PLANNERS** — List any loved ones and the professional advisors you would like to assist you in making your plans a reality.

Visit us on online for more information:
www.audubon.planyourlegacy.org

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CREATING A LEGACY

*Bequests, Wills and
Living Trusts*



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Create Your Own Legacy



You want to be able to decide who receives your assets after your lifetime. Wills and Living Trusts are the most common legal documents used to plan your estate.

A WILL is subject to probate, which is a formal validation by the court of the intentions you've outlined in your Will. Your Will becomes part of the public record.

A LIVING TRUST (*often called a Revocable Living Trust*) is not subject to probate and is, therefore, not part of the public record. The distribution of your assets can often be completed more quickly through a Living Trust than through a Will.

If you die without a Will or Living Trust, the laws of the state where you legally resided will direct how your assets are distributed to your closest living relatives.

Take a little time now to pass the torch on to the next generation.

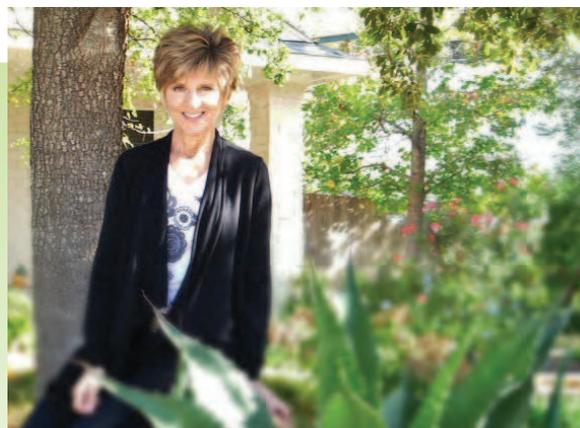


About Bequests

Bequests are the most common form of gift planning and are an ideal way to continue your legacy after your lifetime.

FLEXIBLE: Through your Will or Living Trust, you can bequeath or “pass your assets on” to the individuals and charitable organizations that you care about. If circumstances change, you can make changes to your bequests.

LOW COST: Bequests can be made without dipping into your savings or other assets. You use your assets as you need them while you're alive and bequeath them to others after your lifetime.



“To me, Audubon’s mission is to uphold the civil rights of the earth. I love the way Audubon invites people to be grassroots scientists.” Stephanie Barko designated Audubon as a beneficiary in her trust.

How to Make a Bequest

A bequest can be made for a specific amount or for a percentage of your residual estate.

You must name (*designate*) your beneficiaries (*heirs, individuals and charities*), using their proper, legal names. If you designate Audubon as a beneficiary, our correct legal name is: National Audubon Society, Inc.

Legal Bequest Language for Audubon

“I bequeath the sum of \$ _____ or _____ % of my residuary estate to National Audubon Society, Inc., a not-for-profit environmental conservation organization with its principal offices located at 225 Varick Street, 7th floor, New York, NY 10014, to be used for the support of its ongoing environmental conservation and education purposes.”

To Designate a Specific Audubon State Office, Nature Center or Program

Add the following clause to the end of the legal bequest language above:

“conducted in the state of _____
(Name of State)

and/or for a specific program: _____

(Name of Nature Center or Program)

Audubon promises to be a good steward of the funds you entrust to us. We will honor your wishes and will be eternally grateful for your commitment to sustaining our work.

