

Frequently Asked Questions



The Hows and Whys of Making a Planned Gift with Mass Audubon





Why should I give a Planned Gift?

How is this form of charitable giving meaningful for me and for Mass Audubon?

You know charitable giving is important, but you may not have realized how meaningful planned gifts are. A planned gift blends your personal and philanthropic goals by ensuring support for Mass Audubon, and providing benefits for you, such as potential tax savings and the satisfaction of knowing that you are making a difference. Planned gifts create a legacy for you, provide for our future, and feed Mass Audubon's endowment in perpetuity.

Our endowment is a growing pool from which we fund our work across the commonwealth. This fund, which makes up a substantial portion of our budget, provides consistent support for our operating needs; it helps us weather periods of instability and creates opportunities for us to grow in the future. Furthermore, a planned gift allows you to pass on your values through your legacy of generosity and care for nature. Your gift can help you communicate your beliefs and principles with your loved ones, make a real-world impact, begin a tradition, and so much more.

What asset or kinds of assets should I use to make my gift?

Mass Audubon accepts many types of assets, and the specific gift that is right for you will depend on your personal circumstances. Some donors prefer gifts of highly appreciated stock or securities, knowing that such a gift can have an immediate impact for Mass Audubon and reduce their capital gains at the same time. Others prefer gifts from their IRAs for the ability to save on ordinary income tax. Bequests through one's will, trust or beneficiary designation are also impactful and simple to enact. In some instances, a gift of real estate or personal property could also enable you to support Mass Audubon's mission. We would be happy to talk to you about the many available options and invite you to [read more about them here](#). And of course, we encourage you to speak with your financial advisor as you develop your plan.



Can I use my gift to create a stream of income for myself or a loved one?

Yes! Mass Audubon is happy to work with you to create a plan that helps you meet your financial goals. Charitable Gift Annuities, Charitable Trusts, and participating in our Pooled Income Fund can all provide you with a stream of income based on your gift. How much you receive is dependent on a number of factors such as plan type, the size of your gift, your age, and current rates. You may [compare the types of plans that can pay you income here](#) and we encourage you to reach out to us if these are of interest. We are happy to work with you and your advisor to help you determine the right gift for you.

I am unable to make a current gift, but I want to support Mass Audubon.

How can a Planned Gift help achieve this goal?

Deferred gifts are a great way to make an impact without adding expenses. Many options are available, including ways to give creatively or make a gift of an overlooked asset. You may be interested in deferred and planned [gifts that protect your assets](#), or in [designating Mass Audubon as the beneficiary of an account](#) like an IRA or insurance policy. Give us a call or get in touch via e-mail, and together we can explore options that could work for you.

How will Mass Audubon use my gift? Can I choose?

While the majority of planned gifts are unrestricted, and support the general operation of our wildlife sanctuaries, site-based conservation, and everything from scientific research to education programs, others are designated for specific sanctuaries or projects. Unrestricted gifts are exceptionally important to us because they allow us to remain flexible, grow, and address unforeseeable future circumstances and needs. If there is a specific sanctuary or project you want to support, please let us know so we can work with you to draft language for that gift. Working together, we can ensure that your gift captures your intentions in a way that supports Mass Audubon.



What does Mass Audubon do to recognize Planned Gifts?



Donors who tell us of their gift intention become members of the Tern Society, a group of generous supporters of Mass Audubon who have included Mass Audubon in their will or estate plan and/or who have made a life income gift to Mass Audubon. Members of the Tern Society have opportunities to enjoy special events, meet other members, receive personalized communications and invitations, and are recognized, if desired, in our Annual Report.

I'm interested in giving/protecting land, what can I do?

As an organization dedicated to land protection and conservation, Mass Audubon knows that every gift of land is unique. If you are interested in donating land, we would love to talk with you about your property. Each gift of land has different ecological features that require careful consideration. When you make us aware of your plans, we can help you make sure that your intentions will be realized the way you want them to be.

Further Questions?

Visit massaudubon.plannedgiving.org for more information or contact us directly.

Please get in touch if you're interested in making a planned gift, have any questions about any gift plans, or want to inform us of your intentions. We'd be happy to talk with you about your wishes and help you explore the many options available for gift planning. We look forward to hearing from you. Thank you for considering Mass Audubon in your estate plans.

btownsend@massaudubon.org
781-259-2136

