



## Gifts through **Wills and Trusts**

**A planned gift such as a bequest or trust can create a legacy for you and nature, while honoring and ensuring the future success of Mass Audubon.**

A gift designated through your will or trust—also known as a planned gift—is a way to support and preserve your ideals into the future and create a long-lasting legacy for people, nature, and animals. These forward-thinking, generous gifts may include all sorts of assets, from cash and securities to real estate and paintings; in all cases, we are honored by your consideration of Mass Audubon as a possible beneficiary of your estate. Estate gifts can be handled in several ways and are gratefully welcomed.

**Options include:**

### **Residual Gifts**

- Distribute a remainder portion of an estate to Mass Audubon after other assets have been distributed to loved ones. (Ex. I give 30% of the remainder of my estate to...)

### **Specific or Percentage Gifts**

- Leave a specific asset, dollar amount, or percentage of an asset to Mass Audubon (Ex. I give 100 shares of Apple stock).

### **Contingent Gifts**

- Name a friend or family member as a primary beneficiary, and Mass Audubon as the secondary beneficiary. (Ex. I give my niece my investment account, should she predecease me, I give it to Mass Audubon.)

### **Restricted vs. Unrestricted Gifts**

- You can choose to support a specific program or sanctuary (restricted) or make a powerfully impactful gift that allows funds to go wherever they're most needed in supporting our mission (unrestricted.)



### **What are the Benefits?**

- Creates a legacy of charity and generosity that people will remember when they think of you that people will remember when they think of you.
- Does not affect your current finances, and can have tax benefits for larger estates.
- You become eligible to join Mass Audubon's Tern Society for planned and legacy donors and gain access to a network of people who share your ideals and values.
- Mass Audubon has a track record of sensitively handling beloved property, such as land or other ecological assets.

## How Does it Work?

In order to make a testamentary gift, you must:

1. Have or create a will, and talk to your attorney or estate administrator to add a provision declaring a certain asset or assets to be donated to Mass Audubon.
2. Your legal advisor may need Mass Audubon's:
  - a. **Legal Name:** Massachusetts Audubon Society, Inc., 208 Great Rd., Lincoln, MA 01773
  - b. **Tax ID:** 04-2104702
  - c. **Beneficiary Status:** Nonprofit organization with 501(c)(3) status
3. Your attorney may draft language for this gift, or sample language may be helpful:

“I give and devise to Massachusetts Audubon Society, Inc., a charitable organization headquartered at 208 Great Rd., Lincoln, MA 01773, [asset or value of asset], to be used for its general support.”

*If you are interested in having your gift support a specific program or sanctuary, please contact us so we can work together to draft appropriate language.*
4. If you choose to leave specific property (real estate, land, historical objects, etc.), please contact us! We would love to work with you and your family to ensure it's the right gift for you and our organizational mission, and that your wishes are carried out with fidelity.
5. Once this provision is created, sign and notarize it, and make sure your will is somewhere accessible to your next of kin.
6. Let us know you've decided to put us in your will—we would be honored to hear from you and induct you as a member of our Tern Society.
7. Update your will periodically: every 5-7 years or any time you experience a major life change (marriage, major income change, a move, etc.).

## Further Questions & More to Consider

If you're interested in making a planned gift but aren't sure that a bequest or gift from a will or trust is right for you, please reach out. We'd be happy to talk with you about your wishes and help you explore the many options available for gift planning. Many plans allow you full control and use of your assets during your lifetime, and there are also options which would pay you an income during your lifetime.

Visit [massaudubon.plannedgiving.org](https://massaudubon.plannedgiving.org) for more information or contact us directly.

We look forward to hearing from you. Thank you for considering Mass Audubon in your estate plans.

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### Contact the Gift Planning Department

Betsy Townsend, *Director of Gift Planning*  
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Planning your estate and legacy for future generations, including your charitable interests, takes careful evaluation. We encourage you to consult with your Advisors, as Mass Audubon does not provide individual legal or tax advice.

