



Gift Planning with **Mass Audubon:**

Creating your future legacy for nature today

What is Gift Planning?

Gifts through your will or estate plan— as well as other planned, deferred, and lifetime gifts— are powerful ways to support Mass Audubon and the work we do. These types of gifts ensure support for Mass Audubon and may also benefit you in return. They can help you reduce taxes, create an income stream, or achieve other important financial and philanthropic goals. Together, we can preserve our legacy of protecting land, creating inclusive access to nature and addressing climate change.

What Makes a Planned Gift Meaningful?

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 having an impact. You can build your legacy, provide for our future, and feed Mass Audubon's endowment for decades to come. This fund makes up a substantial portion of our budget, provides consistent support for our operating needs; it helps us weather 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.



The Tern Society

Donors who tell us of their gift intention join our 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, and receive personalized communications and invitations. Terns are also recognized, if desired, in our Annual Report, which also helps us by inspiring others to follow their lead.



Plan Your Gift Now but Give it Later

Deferred gifts are a great way to support Mass Audubon without a current expenditure. Many options are available, including ways to give creatively or make a gift of an overlooked asset. You may be interested in [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.

Common Types of Planned Gifts

Mass Audubon accepts many types of assets. Some donors prefer gifts of stock or other appreciated assets, 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.

Mass Audubon is also 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.

If you are interested in donating land, we would love to work with you and our land team 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.

Please reach out if you have any questions: we look forward to hearing from you.



Contact Us: Visit massaudubon.plannedgiving.org for more information or contact Betsy Townsend directly.

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