

Dear Friend,

We know you believe in the work we do here at the Washington Ethical Society. Your financial support, now and in the future, is critical to the vibrancy of the WES community.

What is "planned giving"? It is thoughtfully selecting, from a menu of gift-giving opportunities, a way to make a gift that is also favorable to you. While its primary purpose is to help WES, its secondary purpose may be for you to enjoy the personal financial or family benefits that certain plans provide to you.

Planned giving is distinguished from outright gifts, which are received immediately and result in a charitable deduction on your income tax return. Planned gifts can provide even more advantages.

You will be recognizing the importance of WES in your life and be leaving a legacy to the future members of WES.

Sincerely,
The WES Stewardship Team

**Together, we can build
the future of WES!**



Sample Bequest Language

I give to the Washington Ethical Society, a charitable organization located at 7750 16th St. NW Washington, D.C. 20012, [insert \$ amount, percentage of estate or residuary estate, or otherwise name gifted assets], for the [insert fund designation if applicable*, i.e. "endowment fund", "building fund", or "general fund"].

*WES recommends leaving legacy gifts unrestricted so that funds remain flexible and can be spent according to current organizational needs. Unrestricted legacy gifts will be utilized according to WES' Legacy Gift Spending Policy.

Legacy Gift Use Policy

Unrestricted legacy gifts are allocated according to our legacy gift policy, which states that up to 10% can go to capital improvements, up to 10% can go to general operating, and that the remainder go to into the endowment fund.

WES recommends leaving the gift unrestricted, simply because WES's future needs might be very different than they are now and our use policy allows for prudent and flexible stewardship of your contribution.

Leaving a Legacy

WASHINGTON ETHICAL SOCIETY



**A humanistic congregation
that affirms the worth of
every person**

Lyn Cox – Interim Senior Leader (clergy)
7750 16th Street, NW Washington, DC 20012
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Is Planned Giving For Me?

You don't have to be wealthy to make a significant impact on the WES community! With a planned gift, WES receives the gift at some time in the future, often after the donor has received lifetime income from the assets. This gift can be revocable (meaning you can change your mind about it), or irrevocable. The tax benefits you receive depend on the type of gift and the assets used to fund it.

While almost any asset you would contribute outright can also be used to establish a planned gift, WES has created policies about the acceptance of non-cash gifts, such as real estate, tangible personal property and securities.

Many Ways to Leave a Legacy to WES

Name WES in your will. Everyone needs at least a basic will, and including a bequest to WES will help ensure that our programs last well into the future. It's the simplest gift to make!

Name WES as a beneficiary of a life insurance policy. Life insurance can allow donors to make a much larger gift than they could any other way.

Name WES as a beneficiary of your IRA, 401(k) or other pension plan.

Include WES in a trust. There are many types of trusts, with various benefits to each type. Living trusts provide for you during your lifetime, with the remainder going to your beneficiaries upon your death.

Create a Charitable Gift Annuity to provide immediate tax deduction, guaranteed lifetime income to you (based on your age) and a donation to WES later.

Create a Charitable Remainder Trust which distributes either a fixed amount or a variable amount for a set term of years.

Create a Retained Life Estate, which gives to WES your personal residence, though you or your spouse can continue to live there during your lives.

Help us create a vision for the WES of the future

Statement of Purpose

The Washington Ethical Society is a humanistic congregation that affirms the worth of every person. We strive through our relationships to elicit the best in the human spirit. With faith in human goodness, we appreciate each person's unique capacities. We joyfully celebrate together and support each other through life. We nurture a sense of reverence and responsibility for each other and the earth.

Why I Give

Like many people with a spouse, children and grandchildren, I planned to leave anything I might have to my family, to ease their way a little if I could. Then I got to thinking about how WES has been part of my family, too—has "been there" for me in so many ways—and that I care a lot about its future as well. So I made an easy family addition to my will.

~Julie Campbell



Be sure to consult an estate planning professional for legal and tax advice appropriate to your situation.



When we thought about our financial legacy, we wanted to leave a portion to WES. So we're changing our will to reflect our optimism and belief in WES's future.

~Ross Wells and Beth Baker