



Creating a Legacy Through Planned & Deferred Giving

LEGACY LEADERS SOCIETY







Your Legacy Through Planned & Deferred Giving

Planned and deferred giving is critical to IWF's ability to unite our global community to advance women's leadership today and tomorrow.

What Is Planned & Deferred Giving?

A planned or deferred gift is a contribution to IWF that is arranged in the present and allocated to the organization at a future date. Commonly donated through a will or trust, these gifts are most often granted once the donor has passed away.

Planned and deferred giving usually involves financial or estate planning. However, it is not reserved for the ultra-wealthy. It is a means by which anyone concerned with the wise use of their personal accumulated resources makes a considered choice about their ultimate disposition.

These types of gifts can be designated for an organization's general fund or endowment.

As you review your different options, you may discover that you can minimize tax consequences, pass on intergenerational wealth, and contribute more to IWF than you initially expected.

The Legacy Leaders Society

In recognition of your planned or deferred gift, IWF will celebrate you and your generosity through the Legacy Leaders Society. The society recognizes our most loyal donors who have made a planned or deferred gift to IWF. As a member of the Legacy Leaders Society, you will be acknowledged on the IWF Member Portal and in event materials, and you will be invited to special events and gatherings.

"Since participating in the Leadership Fellows Program, I have looked for every opportunity to give back to IWF, both locally and globally. I recently became a proud member of the Legacy Leaders Society. My husband, Chris, and I have named IWF in our estate plan. It is our way of saying thank you IWF for everything you have given us."

LeeAnne Linderman
IWF Idaho



WAYS TO MAKE A PLANNED GIFT

- 1 A bequest in a will or trust
- 2 Gifts of special assets including retirement accounts, life insurance, donor-advised funds, foundations, or closely held stock
- 3 A life income gift such as a charitable remainder trust, charitable lead trust, pooled income fund, or a charitable gift annuity

The most common types of planned and deferred gifts include a bequest in a will or trust or naming IWF as a beneficiary on your retirement accounts or life insurance plans. You will find additional information on the following page.

If you would like to discuss other options for making a planned or deferred gift, please contact Rachel Yost, Vice President of Partnerships & Philanthropy, at ryost@iwforum.org.

A Bequest in a Will or Trust

Perhaps the easiest and most common way of making a planned or deferred gift is through your will.

Without a will, the state will divide your assets among your spouse and children (regardless of their age); appoint an administrator that may cost the estate large fees; and appoint guardians, who may or may not have been your choice, for your dependents.

By making a will, you appoint your own administrator; you name the guardian of your dependents; you control your taxes; you create a family or charitable trust; and you can share your resources with your family, IWF, or other institutions.

A bequest can take the form of a set amount of money, a percentage of an estate, a specific asset, or the naming of IWF as a contingent beneficiary.

Because the needs of IWF change over time, many donors make unrestricted bequest gifts. There is no minimum or maximum donation amount for a bequest.

Sample language for a bequest may be found on the next page of this brochure.

Retirement Savings

The remainder value of many retirement accounts can be heavily taxed when left to family and friends. However, if you name IWF as a beneficiary, 100 percent of your remaining balances will go to IWF. This strategy could allow you to earmark lower-tax assets for your heirs while making a meaningful gift to IWF.

Another easy way to leverage your retirement savings is through a required minimum distribution (RMD). If you've reached the age when you need to take RMDs from your retirement accounts, you can donate that money to IWF as a Qualified Charitable Distribution, which will be excluded from your taxable income.



Sample Bequest Language

A charitable bequest is the most common form of providing an ultimate gift for a charitable cause that perpetuates the donor's life interest and influence well into the future. A bequest is a provision in one's will and testament that transfers a gift or property from an estate to a charitable organization. A bequest can also be made by simply adding a section to an existing will.

General Bequest

I hereby give, devise, and bequeath to the International Women's Forum the sum of \$_____ or _____% or _____ fractional interest in my estate.

Specific Bequest

I hereby give, devise, and bequeath to the International Women's Forum the sum of \$_____.

OR

I hereby give, devise, and bequeath to the International Women's Forum the property described as _____.

Residual Bequest

I hereby give, devise, and bequeath to the International Women's Forum the rest, remainder, and residue of my estate, or _____% or _____ fractional interest of the rest, remainder, and residue of my estate.

Contingent Bequest

If any or all of the above-named beneficiaries do not survive me, I hereby give the share that otherwise would be (his/hers/theirs) to the International Women's Forum.

Provisions under the will can also be structured in such a way as to utilize and fund additional life income gifts or deferred gift arrangements.



International Women's Forum Legacy Leaders Society Enrollment Form

The IWF Legacy Leaders Society is an honorary group of IWF's most loyal and committed donors who have chosen to support the important mission of uniting our global community to advance women's leadership today and tomorrow.

IWF thrives because of the generosity of our nearly 8,400 members around the globe, and members of the IWF Legacy Leaders Society play a critical role in providing for IWF's future through their gifts.

I have provided for IWF through (please circle the option you have chosen):

- Bequest in a Will or Trust
- Retirement Plan Beneficiary
- Other: _____

Please enclose documentation of your gift, such as the part of your will that mentions IWF.

Special stipulations, if any: _____

The approximate current value of my gift (optional): _____

Please select your preference for recognition as a member of the society:

- You may include my name on public lists of IWF donors. Please list my name as follows: _____
- I would prefer to be anonymous and that my name not be included in public lists of IWF donors.

Please sign the next page to confirm your participation in the IWF giving society.

If you have questions about planned or deferred giving, please contact Rachel Yost, Vice President of Partnerships & Philanthropy, at ryost@iwforum.org.



International Women's Forum Legacy Leaders Society Enrollment Form

By signing this document, I am confirming my participation in the IWF giving society.

Signature

Date

Printed Name

Telephone Number

Address

City, State, Zip, Country

Please return this form along with the necessary documentation to:

International Women's Forum

Attn: Rachel Yost

1155 15th St. NW Suite 1000

Washington, DC 20005

Or via email to ryost@iwforum.org.

About IWF

The International Women's Forum was founded in 1974 and now unites nearly 8,400 women leaders in 78 Forums and 37 countries with the goal of advancing women's leadership.

The membership is comprised of exceptional women leaders across all professions and is the only organization of this scale that builds significant relationships among C-suite women across careers, cultures, and continents.

78
FORUMS

8,400
WOMEN LEADERS

37
COUNTRIES

We advance women's leadership in three ways:

We **connect** women leaders at thought-provoking leadership convenings. IWF's conferences feature networking opportunities and some of the most authoritative voices on issues essential to global leaders in a changing world. Our conference content is supplemented throughout the year by IWF Online Exclusives, featuring IWF members' insights and innovations.

We **catalyze** women's potential through unparalleled leadership development programs—our flagship Leadership Fellows Program as well as Leadership Intensives.

We **celebrate** the achievements of inspirational and aspirational women with our Leadership Showcases. Our International Hall of Fame, Ideas Remaking the World, and Women Who Make a Difference honor women whose contributions, both globally and locally, provide a window into the art of the possible.





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