



NATIONAL PARK LEGACIES

Gift and Financial Planning Information

Summer 2017

HAVING A PLAN FOR THE FUTURE

With change a part of everyday life, you need a plan to preserve the assets you have worked much of a lifetime to acquire. When considering how you want your property ultimately distributed, it is important to plan now to ensure your wishes will be carried out later.

Important benefits

A well-thought-out estate plan offers a number of important benefits, including:

- Knowing exactly how your assets will be distributed when you no longer need them;
- Making special provisions for family members and others;
- Remembering those organizations that are important to you;
- Planning for management of assets in the event of disability;
- Ensuring your loved ones will not have to deal with unnecessary delays or difficult legal proceedings when carrying out your wishes.

Be clear

Think of your will and estate plan as an instruction manual for the division of your assets. The ideal manual will be clear and precise, leaving no room for doubt or confusion. A poorly designed manual only makes the job at hand more difficult.

Making charitable gifts

Charitable giving should always be thoughtfully considered in light of your plans for retirement, care for dependent loved ones and other personal objectives.

Many friends of the National Parks Conservation Association have included us in their plans after first providing for loved ones.

Learn more

Please continue reading for more information about how you can include NPCA in your estate plans.

Above: Garden Wall in Glacier National Park © qiaohuavip | iStock
Below left: Grazing Bison in Grand Teton National Park © sara_winter | iStock Below right: Elk at Rocky Mountain National Park © jc_design | iStock



INSIDE:

CREATING AN EFFECTIVE ESTATE PLAN

YOUR WILL—YOUR WAY

IF YOU'VE ALREADY MADE YOUR WILL...

CREATING AN EFFECTIVE ESTATE PLAN

Having a proper will and other estate plans in place can be one of the most satisfying accomplishments in your life.

Begin here

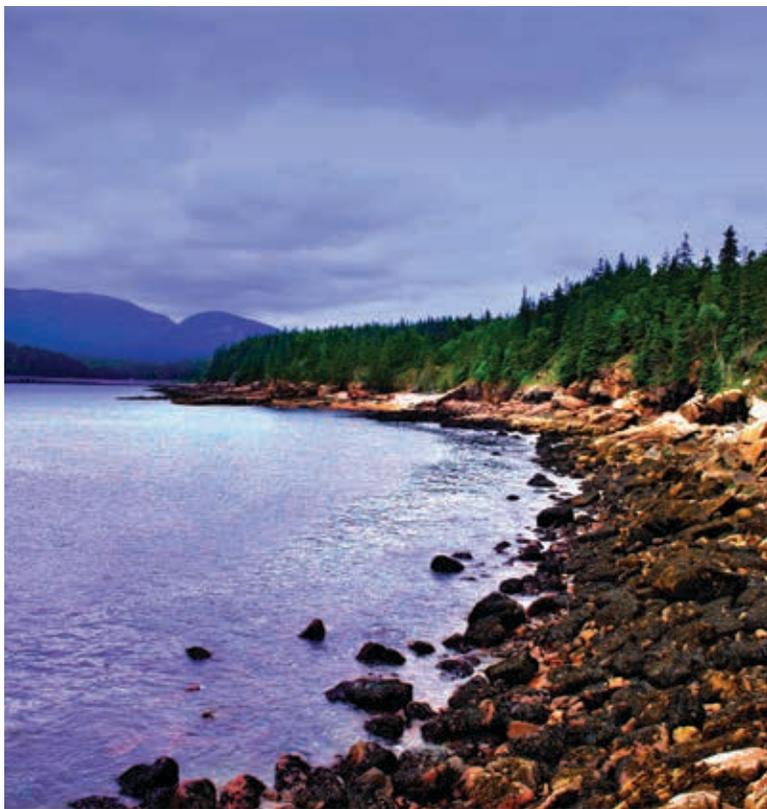
Procrastination may be the greatest threat to your future security and that of your loved ones. The following steps can help you gain control of the planning process.

1. List the people you wish to remember.
2. Decide how you want your property distributed among them.
3. Appoint a guardian for any minor children or others who will need assistance in the future.
4. Name an executor (or personal representative) to handle the settlement of your estate.
5. Consider a living trust.
6. Make an appointment with your attorney.
7. Have a valid and up-to-date will prepared.
8. Plan for incapacity.
9. Review beneficiary designations of life insurance policies and retirement plans.
10. After providing for loved ones, remember those charitable organizations you care about and want to support, such as NPCA.

Start today

The relatively small amount of time needed to create an estate plan seems even smaller when you consider the benefits.

See your attorney and other advisors today. Through careful planning, you may find you can meet a variety of personal and family needs while making special charitable gifts. Discover the peace of mind that can come from knowing you have recorded your wishes for the future.



Acadia National Park © Coleong | Dreamtime.com

WHO DO YOU WANT TO PROVIDE FOR?

1. Spouse
2. Children
3. Sibling
4. Grandchildren
5. Nieces, nephews
6. Special friends
7. National Parks Conservation Association

With careful planning, you may be able to provide for your loved ones and make a special gift that will help preserve our national parks for generations to come.

YOUR WILL—YOUR WAY

When it comes to writing your will, you can choose how much—and to whom—you want your assets distributed in the future.

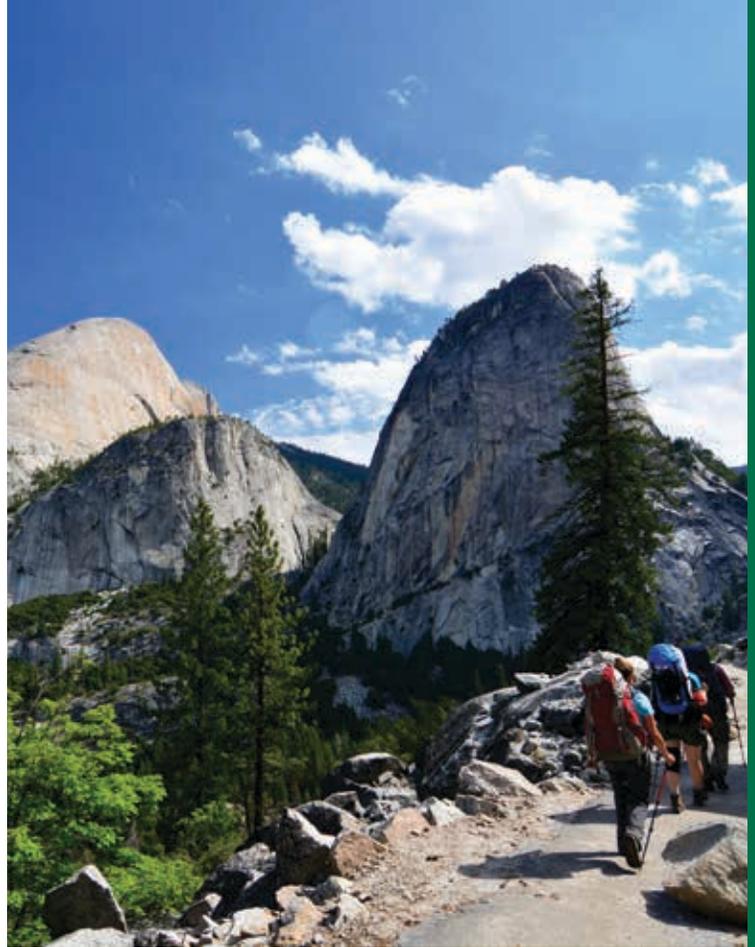
Your will and other estate plans can be extremely flexible instruments and there are a number of ways you can designate your loved ones and NPCA to receive bequests.

Give “what’s left.” The residue of your estate is what remains after all other distributions have been made. After first providing for loved ones, you can devote all or a portion of the remainder of your estate to NPCA or other charitable organization.

Give a percentage. A way to ensure that your charitable gifts remain “fixed” in relation to other bequests is to provide that a percentage of your estate be given to NPCA. If the size of your estate changes, your charitable gifts will automatically change as well.

Give a fixed amount. You can specify that a certain dollar amount be given to charity.

Combine giving methods. You can combine any of these methods of giving. For example, you might specify that certain amounts or properties go to certain people, then divide the remainder by percentages among favorite charitable organizations.



People hiking in Yosemite National Park © Onnes | iStock

And remember that you can name NPCA as the beneficiary of a savings or checking account, investment account, a life insurance policy or the remaining funds in a retirement plan account.

Below: Scenic sunrise at Great Smoky Mountains National Park © Credit:WerksMedia | iStock



IF YOU'VE ALREADY MADE YOUR WILL...

Congratulations! But does it need to be revised? There are many events in life that might call for updating your plans. Ask yourself these questions:

1. Have I reviewed my plans in the last three years? **Yes** **No**
2. Is my executor (personal representative) still appropriate and willing to serve? **Yes** **No**
3. Does my will still meet my family's needs, given any births, marriages or deaths that may have occurred? **Yes** **No**
4. Is my state of residence the same since I last reviewed my will? **Yes** **No**
5. Has the value of my assets remained the same since my last review? **Yes** **No**
6. Do my plans reflect any recent changes in estate and tax laws? **Yes** **No**
7. Have I included gifts to favorite charitable organizations in my plans? **Yes** **No**
8. Are the beneficiary designations of my life insurance policy and retirement plans up to date? **Yes** **No**



Couple enjoying the view in Glacier National Park © Bkamprath | iStock

... If you answered “No” to any of these questions, you may want to review your plans with your advisors and update them so they reflect your current wishes for the future.



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NPCA's Recommended Bequest Language

Including NPCA in your will is among the easiest ways to offer support of NPCA's work for years to come. NPCA's Board of Trustees has suggested the following language to include NPCA as a beneficiary of a will or trust: "I give _____ (specific amount, percentage, or residuary share) to the National Parks Conservation Association, having its principal offices at 777 6th Street, NW, Suite 700, Washington, DC 20001-3723. (Federal Tax Identification Number 53-0225165)." If you already have a will, you can have your attorney add a codicil to include NPCA.

Copper Butterfly on Showy Daisy in
Rocky Mountain National Park, Colorado
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