



Bequest Language

With these simple words added to your will or trust, you can be confident that your efforts will continue to create equitable, climate resilient communities that will thrive long into the future.

“I give, devise and bequeath to Daily Acts (Tax ID 20-3851259), a nonprofit organization located in Petaluma, CA all or ____% or \$_____ of the rest, residue and remainder of my estate, to be used where it determines the need is greatest (or for the support of a specific fund or program).”



Leave a lasting
Legacy

Build climate resilience
in our communities for
generations to come.



www.dailyacts.org/legacy-giving

Types of Gifts

1 Gifts of Stocks & Bonds

Donating appreciated securities, including stocks or bonds, is an easy and tax-effective way for you to make a gift.

2 Gifts of Retirement Assets

Donating part or all of your unused retirement assets such as a gift from your IRA, 401(k), 403(b), pension or other tax-deferred plan is an excellent way to make a gift.

3 Gifts of Cash

A gift of cash is a simple way to support us.

4 Gifts of Insurance

If you have a life insurance policy that has outlasted its original purpose, consider making a gift of your insurance policy.

Contact Us

If you have any questions, or are looking to connect deeper with Daily Acts, please do not hesitate contacting us anytime at 707.789.9664 or development@dailyacts.org.



Join Our Legacy Circle

Legacy giving, or planned giving, involves donations made to a charity as part of one's estate or financial planning, typically through a will or trust. These gifts can include cash, real estate, stocks, or a percentage of one's estate.

A meaningful way to support Daily Acts is by joining our Legacy Circle and including us in your estate plans. It costs you nothing during your lifetime and helps secure our work for the future.

"If climate change is going to be addressed, it's going to be done by people working at a scale where they can see the influence of what they're doing. My hope would be that Daily Acts is seen as a model that teaches others in California, and perhaps even beyond. That's because I love what Daily Acts does and what it can become."



Bruce Hartsough
Legacy Circle Member

Create a legacy for a cause that is close to your heart

Bequest

A bequest is one of the easiest and most flexible gifts you can make. With the help of an advisor, you can include language in your will or trust specifying a gift be made to Daily Acts as a part of your estate plan.

A bequest can be made by:

- Gifting a specific dollar amount or asset
- Gifting a percentage of your estate
- Gifting from the residue of your estate

Benefits of a bequest include:

- Receive an estate tax charitable deduction
- Reduce the burden of taxes on your family
- Leave a lasting legacy to a cherished cause

Qualified Charitable Distribution

Qualified Charitable Distribution (QCD) allows taxpayers who are 70 ½ or older to transfer up to \$100,000 annually from their IRA accounts directly to a qualified charity without first having to recognize the distribution as income.

Benefits of QCD:

- Avoid taxes on transfers of up to \$100K from your IRA to our organization
- Satisfy your required minimum distribution (RMD) for the year
- Reduce your taxable income, even if you do not itemize deductions
- Make a gift that is not subject to the deduction limits on charitable gifts
- Help further our vital work

