



# Make a Lasting Promise to the Indian River Lakes Region

Rob Sartwell

## You can leave a legacy with a planned gift.

Planned gifts offer you opportunities to help conserve Indian River Lakes Region while providing financial flexibility.

Listed here are the most popular types of planned or legacy gifts. You can have peace of mind knowing you've played a significant role in protecting this unique region for future generations to enjoy.

*We chose to provide a gift of real estate because we believe in IRLC's mission.*

*The world is in such chaos globally, so the best way we know to help us all to create a more sane and sustainable society is to support strong, visionary local organizations.*

*We trust IRLC to protect the local watershed for generations to come.*

– Rich & Sally Sauer

## Bequest

Designate Indian River Lakes Conservancy as the recipient of cash, real estate, or another asset in your will. Or you can leave a percentage of your overall estate to IRLC.

## Retirement Plan Assets

Name Indian River Lakes Conservancy as the beneficiary of an IRA, 401(k), 403(b), or other qualified retirement plan.

## Life Insurance

Name Indian River Lakes Conservancy as the beneficiary, or as both the beneficiary and owner, of a new or existing policy.



Judy and Bud Adams enjoy a walk on IRLC's All Access Trail at Redwood Hill Preserve

## Gifts of Appreciated Securities

Gifts of securities, including stocks and bonds, may provide you with savings on capital gains taxes as well as an income tax deduction.

## Retained Life Estates

Through a retained life estate, you may transfer ownership of your home, farm, or other property to Indian River Lakes Conservancy, while retaining the right to live there during your lifetime. This has income tax benefits and can simplify estate settlement and taxes.

## Charitable Remainder Trust

A charitable remainder trust is a tax-exempt irrevocable trust designed to reduce your individual taxable income. It first disperses income to the beneficiaries of the trust for a specified period of time and then donates the remainder of the trust to the designated charity.

## Gift of Real Estate/Other Assets

Gifts of any type of asset may be made during your lifetime or through your will to provide you with tax benefits.

Land with important conservation values can be donated to IRLC. Houses, buildings, and other developed real estate can be donated as trade properties: the sale of the property then provides funding for conservation projects.

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## Professional advice from your financial advisor is an important step in making a planned gift.

We can also provide information to help inform that conversation if you wish. And we are always happy to meet or talk, confidentially, about any of these options so that you can leave a legacy for the waters you know and love, for today, and for generations to come.



## Your planned gift will help protect the Indian River Watershed for generations to come.

When you let us know about your planned gift we can thank you for safeguarding the conservation of the lands and waterways, and connecting kids to nature, that are at the heart and soul of the Indian River Lakes region. These gifts will make a difference, each and every day.

Planned gifts can be as simple as including us in your will or donating your camp or retirement home and retaining a life estate.

It's a great way to leave a legacy at a time when nature, kids and families, and the lakes need you more than ever.



Indian River Lakes  
CONSERVANCY  
Protect • Learn • Enjoy • Forever

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