



Leaving a Legacy for the Sonoran Desert

Thank you for wanting to leave a legacy for Sonoran Desert wildlife and open spaces. Your legacy gift will allow future generations to enjoy the beautiful Sonoran Desert; improve wildlife habitat and restore wildlife linkages; and buttress the Sonoran Desert from the impacts of climate change.



What is Legacy or Planned Giving?

A legacy or planned gift is a gift that a donor decides to give at some future date. There are various types of legacy gifts, including bequests in your will or trust, and being included as a beneficiary of your retirement plan, IRA, or life insurance policy. Legacy giving allows you to make a generous gift that you might never be able to give during your lifetime - and have a huge impact on the people and wildlife of the Sonoran Desert.

Who can give a legacy gift?

Anyone! You do not need to be wealthy, it does not cost a thing, and you can change your mind at any time by changing your will. You can also give gifts of any size.

May I designate my gift to a specific purpose?

Yes. Your gift may be designated for one of our programs. However, unrestricted gifts will allow us to apply your donation towards the greatest need and give us the most strategic flexibility on how your gift can create positive change.

Is it possible to make a gift through my will, and can you accept a gift like this?

Yes. A bequest is the most common type of legacy gift and is often the easiest way to make a significant contribution to the protection of the Sonoran Desert. Please discuss the appropriate bequest language with your financial advisors in order to include us in your will or other estate-planning documents. Often it is as easy as updating your will with a codicil/addendum. If you choose to go this route, you can use the example bequest and codicil language on page 3.

Is it possible to name the Coalition for Sonoran Desert Protection as a beneficiary of my retirement plan or life insurance plan or give a Qualified Charitable Distribution from my retirement plan?

Yes. Leaving a retirement plan or IRA (or a portion of it) is a tax-wise gift because you will avoid all estate and income taxes on the plan assets after your lifetime (or at the death of the survivor of you or your spouse). To make this gift, you simply notify your plan's administrator of your wish to change the beneficiary. A "change of beneficiary" form will be required. The Coalition for Sonoran Desert Protection can be designated as a full or partial beneficiary of your plan. You can also name the Coalition as a primary, partial, or alternate beneficiary of your life insurance policy by filling out a change of beneficiary form with your insurance company.

We have many donors that have given the Coalition generous Qualified Charitable Distributions from their retirement plans. However, there are some very specific rules in place regarding who can do this. The first rule is that you must be 70 1/2 years old on the date of the distribution. The gift also has to come from an IRA, not other types of retirement plans. For more detailed information on this option, please read the information on [this website](#) and always consult with your financial advisor for the latest rules and regulations.

What is your Tax ID Number?

The Coalition is an independent, non-profit, tax-exempt 501(c)(3) organization. Contributions to the Coalition for Sonoran Desert Protection are tax-deductible to the extent permitted by law. The Coalition's EIN # (or Tax ID #) is 82-2156664. (Note: Prior to March 1, 2018, the Coalition was a fiscally-sponsored project of the 501(c)(3) non-profit organization Sky Island Alliance. If you included the Coalition in your will or other type of bequest and used Sky Island Alliance's EIN # (86-0796748), please update your files.).



Photo credit: Helen Mellen

Who can I talk to for more information?

If you'd like to discuss legacy giving, please give our Co-Executive Director Kathleen Kennedy a call at (520) 388-9925 or send her an email at Kathleen.Kennedy@sonorandesert.org and she would be happy to talk to you further to discuss your options.

Information provided here is meant as general information only. The Coalition for Sonoran Desert Protection strongly advises you to also seek legal and financial counsel when planning a legacy gift.

Sample bequest language:

I hereby give to the Coalition for Sonoran Desert Protection, Tax Identification number 82-2156664, the following: the sum of \$ _____ OR _____ percent (___%) of my estate OR _____ percent (___%) of the residue of my estate. The Coalition for Sonoran Desert Protection shall use this gift for support of their general operations.

Sample codicil language:

(date)

I, (name), a resident of the County of [county], State of [state], declare that this is the codicil to my last will and testament, which is dated [date original will signed].

I add or change said last will in the following manner: [List all changes or additions to the original will. Reference each section number of the will and the specific language you will be affecting. Here is where you could include a bequest to the Coalition for Sonoran Desert Protection. See Sample Bequest Language on previous page to assist you.]

Otherwise, I hereby confirm and republish my will, dated [date original will signed], in all respects other than those herein mentioned.

I subscribe my name to this codicil this [day, e.g. 1st] day of [month], [year] at [full address where signed], in the presence of [full name of the first witness to codicil], and [full name of second witness to codicil], attesting witnesses, who subscribe their names here in my presence.

(you sign here)

_____, Maker

ATTEST

On the date last above written, [name], known to us to be the person whose signature appears at the end of the codicil, declared to us, [full name of the first witness to codicil], and [full name of second witness to codicil], the undersigned, that the foregoing instrument, consisting of [number of pages of the codicil] page(s), was the codicil to the will, dated [date original will signed]; who then signed the codicil in our presence, and now in the presence of each other, we now sign our names as witnesses.

[Names, signatures, addresses, and date signed of two witnesses.]