



Josh Bootz or Micah Smith/7RootsCreative

Fund a Thriving Forest Future with a Gift in Your Will or Other Estate Plan

Did you know that gifts in wills and other legacy gifts provide critical, sustainable support to fund a thriving forest future?

It truly takes a forest to raise a mighty redwood!

Redwoods take care of each other. A redwood's shallow but widespread roots help them survive by intertwining with roots from the trees around them. They support—and talk to—each other by sharing needed nutrients, shade, and other resources to thrive.

And the redwoods care for us: they protect our air and water; they stand tall against climate change; and they offer us wonder and inspiration; play and recreation; and connect us to thousands of years of history that came before us – and will continue after us.

By protecting and connecting redwood forests in the Santa Cruz mountains, we can help redwoods thrive together so they can grow tall, clean the air, and provide habitat and awe for thousands of years.

You have done so much to support Sempervirens Fund and the coast redwoods of the Santa Cruz mountains. Have you considered one more action you can take right now to help create a world that you want to leave behind?



A gift to Sempervirens Fund in your will or living trust or by beneficiary designation, has a lasting and outsized impact on the acquisition and protection of the redwood forests in the Santa Cruz mountains for all, forever to enjoy.

You can help those who come after us inherit a vibrant and verdant environment. Your legacy ensures that every acre will be protected and that we will be able to fulfill our commitment to steward the forests through whatever the future holds.

A Simple, Flexible Way to Give

- A gift in your will or by beneficiary designation requires no immediate donation, and you can change your mind at any time.
- You can name Sempervirens Fund as a secondary or contingent beneficiary, so we only get your gift if your other beneficiaries don't survive you.
- We welcome gifts in any amount. Even 1% of what remains after your loved ones are remembered can have an enormous impact.

A Gift in Your Will or Living Trust

There are several ways to include a gift to Sempervirens Fund in your will or living trust. Your attorney can help you determine the best way to make your gift. Some options:

- You can leave some percentage of your estate.
- You can leave a defined sum to Sempervirens Fund.
- You can leave a percentage of funds left over after other gifts and debts are paid and your loved ones are provided for.
- You can make a secondary or contingent gift that comes to Sempervirens Fund only if your other beneficiaries do not survive you or other specific gifts cannot be fulfilled.



Sempervirens Fund suggests this simple language for your will, codicil to your will, or your living trust:

“I heareby give and bequeath <description of gift> to Sempervirens Fund, a not-for-profit, tax-exempt land conservancy incorporated under the laws of the State of California, with tax ID # 94-2155097, for Sempervirens Fund’s general purposes.”

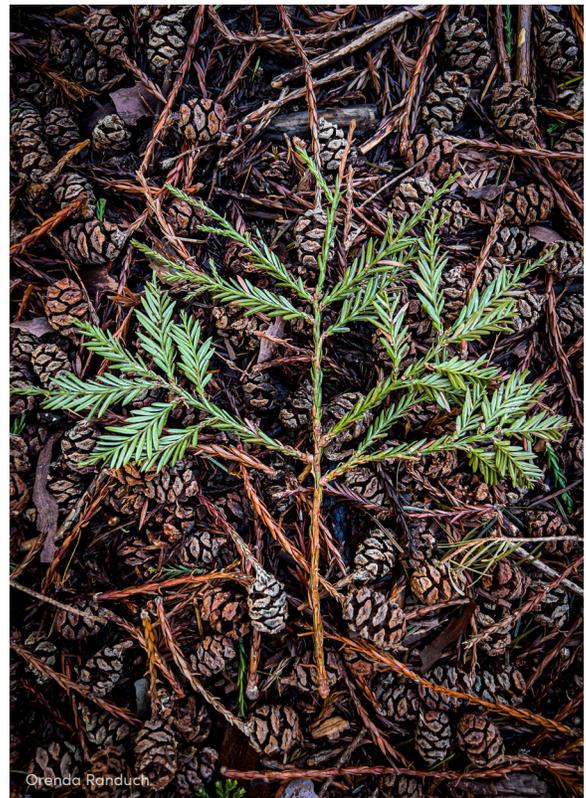
A Gift by Beneficiary Designation

You can name Sempervirens Fund as a beneficiary of some percentage or all of your retirement accounts, life insurance plan, Donor-Advised Fund (DAF), and other financial accounts, including your bank and brokerage accounts.

As with gifts in your will, you can designate all or a percentage of the funds in your account, and you can name Sempervirens Fund as a primary beneficiary or a second-in-line beneficiary. And, of course, you can change your mind at any time.

To make a gift through a beneficiary designation, contact your retirement plan administrator, insurance company, bank, or financial institution for a change-of-beneficiary form. You may be able to request or download your form from your online account portal.

If you have a donor-advised fund, you can name Sempervirens Fund to receive all or some of the funds remaining at the end of your life.



Be sure to include our Tax ID number #94-2155097

And please let us know. Some financial institutions will not notify us after your lifetime that we are a beneficiary; sharing your wishes now helps ensure your gift will be distributed as you wish. We will always keep your information confidential, and you can update your plans at any time.



Frequently Asked Questions and Considerations

Do I need a will?

Yes! Every adult needs a will (or living trust, or both!) and should review it every five years or so to ensure that it's up to date. A will and/or living trust accomplishes some important tasks, including allocating your assets, reflecting your most important relationships, designating guardians for children and caregivers for beloved companion animals, and even giving gifts to charity.

I have a will and/or trust, but I'm not in a position to update it now. How can I include a gift to Sempervirens Fund?

Naming us a beneficiary of your retirement plan, financial account or donor-advised fund is as simple as updating your beneficiary designation form and doesn't require an attorney.

I have family or loved ones that I need to take care of. How can I do that and still support Sempervirens Fund?

You can make us a beneficiary of a small percentage of your estate or account, or name us a secondary or contingent beneficiary so we only receive a gift if your primary beneficiary doesn't survive you.

What if I have included a gift to Sempervirens Fund but change my mind?

None of us know what the future holds. And we understand that, sometimes, a gift that has been directed to Sempervirens Fund must be allocated to more pressing needs. But the decision is always yours to make. You are never obligated by a giving decision you make today.

If you would like to direct your gift to a particular project or for a particular purpose, we can assist you and your attorney in drafting language that ensures your gift will be used as you intend.

Other Ways to Give

Using Real Estate to Create Lifetime Income:

If you have appreciated real estate, you can donate it to create a charitable remainder trust (CRT). You will receive income for life or a term of years, and significant tax benefits, while ultimately making a gift to Sempervirens Fund. Please contact us to discuss this gift option.

Make Qualified Charitable Distribution (QCD) from Your IRA:

If you are over age 70.5, you can make a gift directly from your IRA to Sempervirens Fund and avoid paying any income tax on the distribution. If you must take a Required Minimum Distribution, you can use some or all of your RMD to make a QCD.

Tribute and In Memory Gifts:

If you have a loved one who has inspired you or has fostered your appreciation for the redwoods, we would be happy to recognize your gift in their honor, creating a lasting tribute to someone special.



The Redwood Legacy Society

If you have already made a gift for Sempervirens Fund, we hope you will let us know. With your legacy gift, you become a member of our Redwood Legacy Society, a passionate group of givers who intend for future generations to enjoy the magnificent coast redwoods of the Santa Cruz Mountains. Society members receive special updates and invitations to Sempervirens Fund events.

To explore your giving options, let us know you've completed a gift, or to learn more about particular programs and projects, please contact:

Amanda Krauss, CFRE
Director of Tribute and Legacy Giving
akrauss@sempervirens.org or 650-946-1051
sempervirens.org/your-legacy

We also encourage you to consult your professional tax or legal adviser prior to establishing a legacy gift.

