

# LEAVE A GIFT THROUGH YOUR IRA AND OTHER ACCOUNTS



Making Audubon a beneficiary of your IRA/retirement plan, life insurance policy, bank account, CD, or other managed account is easy, fast, and can be done without an attorney. These types of legacy gifts are rapidly becoming popular, and play a significant role in sustaining our future conservation work.



Subject to multiple types of taxes, IRA, 401(k), and other qualified retirement plans are the best—and easiest—assets to leave to charity. You can designate all or a portion of the funds remaining in your plan as a gift to Audubon, and 100% of your gift will help protect the birds you love. And remember, you can change your mind at any point along the way.

## TO MAKE THIS GIFT:

- Request or download a beneficiary form from your account manager.
- Name Audubon as a partial, contingent, or sole beneficiary of your account.
- If you are married, you will need to complete a spousal waiver form, also available from your account manager.

Legal name: National Audubon Society, Inc.

Tax ID number: 13-1624102

If you want your gift to support a specific Audubon Center or program, attach a letter stating this wish to a copy of your beneficiary form, and keep these documents with your will.

It is important to note that naming a beneficiary within the framework of your will is not sufficient; you must complete the appropriate paperwork provided by your plan's administrator. For married people, a spousal consent form is also required by law. These forms are available with your plan's administrator.

We recommend you and your financial planner review your beneficiary forms every five years to make sure they are up to date.

## WHAT DONORS SAY:

“Changing my IRA beneficiary form to list Audubon as the recipient took me ten minutes, was free, and now I’m delighted to have helped sustain Audubon’s exciting work. I didn’t have to update my will and I feel good knowing the gift will someday go directly to Audubon, without going through probate or my estate.”

—Ken L.

“I am proud to include Audubon as a beneficiary of my retirement account. It was easy to set up, and a wonderful way to leave a gift to a movement that will outlive us all.” — Elizabeth L.

## LET US KNOW!

Notifying Audubon of your intended gift helps us honor your wishes in using your gift. To request a **Legacy Confirmation Form**, contact us at:

Audubon Office of Gift Planning  
225 Varick St., 7th Floor  
New York, NY 10014  
[www.audubon.org/legacyplannedgifts@audubon.org](http://www.audubon.org/legacyplannedgifts@audubon.org)

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