



Planned Giving Declaration of Intent

Membership in the Texas Wildlife Association Foundation Legacy Society is reserved for those who have made a provision valued at \$25,000 or more for the TWAF through testamentary bequests or other planned giving techniques. I am/We are pleased to make following type of legacy gift to Texas Wildlife Association Foundation:

- ☐ I have included Texas Wildlife Association Foundation in my will or living trust.
- ☐ I have named Texas Wildlife Association Foundation as beneficiary of a life insurance policy.
- ☐ I have named Texas Wildlife Association Foundation as beneficiary of a retirement or other financial account.
- ☐ I have arranged a trust, annuity, or other planned gift for the benefit of the Texas Wildlife Association Foundation.
- ☐ Other (briefly describe) _____

My gift is to be used for the following purpose(s):

(Choose one or more purposes and provide any desired explanation below)

- ☐ Unrestricted (where most needed)
- ☐ Conservation Legacy
- ☐ Hunting Heritage
- ☐ TWAF Legacy Endowment (restricted in accordance with the TWAF Policy for Fund Management, Investments and Spending)
- ☐ A combination of one or more of the above

Please provide a brief explanation of your chosen purpose(s):

- ☐ I/We agree that in the event the purpose of the restriction on my gift can no longer be served, in the sole discretion of the TWAF Trustees, the Trustees may devote any remaining assets towards TWAF charitable purposes that are within the scope of the TWAF mission.

The approximate amount of my legacy gift will be \$_____.

CHECK ONE ONLY:

- ☐ I/we give permission to list my/our name(s) as a member of the Texas Wildlife Association Foundation Legacy Society with the understanding that the amount of my/our gift will remain confidential. I agree that my/our names may appear as having donated in excess of a specified dollar amount and that this does not violate any confidentiality.

OR

- ☐ Thank you, but I/we wish to remain anonymous.

My/Our names should appear in Texas Wildlife Association Foundation publications as follows (please include your spouse if you would like):

Name(s): _____

Address: _____

Phone: _____ Email: _____

Print Name _____ Signature _____

Date _____

Please return
this form to:



Texas Wildlife Association Foundation
Director of Development
6644 FM 1102
New Braunfels, TX 78132

I/we understand that, by stating an amount, this statement does not legally bind my/our estate, and that I/we may choose to add, subtract, or revoke this bequest at any time in my/our sole discretion. As with any decision involving your assets and/or estate, we urge you to seek the advice of professional counsel when considering a gift to Texas Wildlife Association Foundation.

There are many ways in which you can make a lasting impact on the future of outdoor education with TWAF. The most common form of support is through cash donations, annual gifts, memorials, and matching gifts. Another, and often overlooked, way for you to support TWAF is through planned giving. A planned gift is made during your lifetime or as a bequest in your Last Will and Testament, and can include gifts of equity, life insurance, real estate, personal property, cash, or other assets and can be beneficial to both you and to TWAF in estate and tax planning.

Please discuss options with our TWAF Director of Development, TJ Goodpasture, and with your estate planning professional. TJ can be reached at our TWA Headquarters at (800) 839-9453.

Thank you for supporting the Texas Wildlife Association Foundation!



Planned Giving Information

The Texas Wildlife Association Foundation (TWAF) was established in 1991 as a non-profit 501(c)3 whose mission is to increase natural resource literacy by promoting conservation and educational programs that connect Texans to the land. Thank you for your interest in planned giving through The Texas Wildlife Association Foundation. Although there are many methods of making a gift of this sort (trusts, annuities, life insurance, etc.), we are primarily targeting testamentary bequests in this information. It is our hope that we can assist you in making necessary decisions and can answer questions that you will likely have in this process. TWAF has a close relationship with the Texas Wildlife Association (TWA), working together to continue to create, establish, and introduce innovative approaches to achieving agriculture and natural resource literacy and foster life-long learning for students of all ages. TWA is a non-profit 501(c)4 whose mission is to serve Texas wildlife and its habitat, while protecting the property rights, hunting heritage, and the conservation efforts of those who value and steward wildlife resources.

TWAF provides primary funding for TWA education programs, and participates in various partnerships to train conservation ambassadors and equip the leaders of tomorrow. In order to provide this funding and in order to carry out its programs and partnerships, TWAF needs support from generous, like-minded donors. TWAF is funded largely through the generosity of donors interested in protecting the land, water and wildlife of the state of Texas.

We appreciate your interest in providing support to TWAF through planned giving. We have prepared this information to assist you, and to answer questions you will likely have, as you go through this planned giving process.

WHAT IS PLANNED GIVING?

Planned giving is sometimes referred to as legacy giving or the intention to make a gift beyond the donor's lifetime. Planned giving is the process of planning a gift during a donor's lifetime that will actually be given to an organization in the future. These can be gifts of cash, equities, insurance, real estate or other assets. The vehicles used to make such future gifts include testamentary bequests through the donor's Will, trusts, annuities and others. In this document we will focus only on gifting through the most commonly used vehicle, your Will.

TWAF LEGACY SOCIETY

Planned giving donors who provide funding to TWAF through testamentary bequests or other planned giving techniques play an extremely important role. In order to recognize and honor those donors who help protect the land, water and wildlife of Texas by contributing to the funding of TWAF through testamentary or other planned giving techniques in an amount of \$25,000 or greater, TWAF has established the Texas Wildlife Association Foundation Legacy Society. We look forward to recognizing you as a member of the TWAF Legacy Society.

TESTAMENTARY BEQUEST OPTIONS

In order to make a testamentary bequest to TWAF, you will need to have your attorney revise your Will or add a Codicil to accomplish this bequest. In making that bequest to TWAF you have various options as follows:

1. **Unrestricted gift** – You can simply make a gift to TWAF that is not restricted as to how it is used. It may be used in any amount for any purpose deemed appropriate by TWAF. An example of a Will clause that gives an unrestricted bequest might be as follows: “I give to the Texas Wildlife Association Foundation, a nonprofit corporation currently located in New Braunfels, Texas, or its successor thereto, _____ (written amount or percentage of estate or description of property) for its unrestricted charitable use and purpose.”
2. **Restricted gift** – You can personally define what restrictions will be attached to your gift. For instance, you may want to define how much of your gift can be spent in any one year. You might want to define the purposes for which your gift can be spent. An example of a Will clause that gives a bequest that carries personal restrictions might be as follows: “I give to the Texas Wildlife Association Foundation, a nonprofit corporation currently located in New Braunfels, Texas, or its successor thereto, _____ (written amount or percentage of estate or description of property). This charitable gift shall be used for the sole purpose of (detail the specific purpose or restriction for the use of such bequest. Examples include wildlife education programs, general administrative expenses, capital improvement projects, etc.).”
3. **Gift to the TWAF Legacy Endowment** – TWAF has established an endowment to receive testamentary bequests. The funds in that endowment are managed in accordance with the TWAF Policy for Fund Management, Investments and Spending. That document and the associated policies are managed by the TWAF Board of Trustees who are charged with prudent management of the financial assets of TWAF. That policy allows no more than 5% of the net asset fair market value of the endowment fund to be distributed annually to TWAF to fund on-going operations or granted to TWA for non-lobbying purposes including Conservation Legacy or Hunting Heritage Programs. Conservation Legacy includes the TWA natural resource education programs designed to create natural resource literacy in students of all ages. Hunting Heritage Programs educate Texans about the importance of wildlife management and the integral role that hunting plays in habitat conservation, while instilling a love of the outdoors. Gifts to this endowment provide a convenient means of making a meaningful gift that automatically carries restrictions on spending. An example of a Will clause that gives a bequest to the TWAF Legacy Endowment might be as follows: “I give to the Texas Wildlife Association Foundation, a nonprofit corporation currently located in New Braunfels, Texas, or its successor thereto, _____ (written amount or percentage of estate or description of property). I direct that such amount shall be given to the Texas Wildlife Association Foundation Legacy Endowment to be administered and distributed pursuant to the Legacy Endowment’s terms and conditions.”

DECLARATION OF INTENT AND CONFIDENTIALITY

Attached to this informational document you will find another document entitled Planned Giving Declaration of Intent. In that document you will be able to check off information regarding your intentions in making this bequest. You will also be able to define the level of confidentiality you expect TWAF to adhere to regarding your bequest. TWAF would like to publish your name from time to time in recognition of your generosity but will do so only with your permission. Please complete this Declaration and return it to TWAF as instructed in the Declaration. TWAF will hold this Declaration of Intent for safekeeping and will honor your wishes as defined in the Declaration.

The Declaration of Intent is important for another reason. All gifts to TWAF must be reviewed by TWAF and may only be accepted if the gifts are not inconsistent with its stated mission, purposes and priorities and are consistent with its related Gift Acceptance Policy. The Declaration of Intent provides TWAF with needed information for that review.

We thank you for your interest in donating to TWAF through planned giving or otherwise. Your generosity is what allows TWAF to carry out its mission. We welcome you to our Legacy Society and stand ready to be of assistance in any way needed.

Note: This document and all statements contained in this document are for informational purposes only and are not to be relied upon as legal advice. You should consult with your attorney and follow your attorney’s advice regarding any and all matters discussed herein.