



LEGACY SOCIETY

CREATE A LASTING LEGACY: JOIN EQUALITY FLORIDA'S LEGACY OF EQUALITY SOCIETY

HOW TO PROVIDE FOR EQUALITY FLORIDA IN YOUR WILL

Providing for Equality Florida's work in your estate plans is a wonderful way to create a lasting legacy. Resources from your estate can be used in your name to make the world a better place for the next generation of lesbian, gay, bisexual, and transgender people.

There are many ways to make a bequest. An estate planning professional can help you tailor a bequest to fit your needs. By means of a bequest, you can give many different kinds of property to Equality Florida including cash, securities, real estate, and personal property such as jewelry or artwork.

It is also possible to obtain substantial income or estate tax savings by including Equality Florida in your estate plan. Your attorney or tax professional can advise you on your specific circumstances and help you decide what is best for your individual situation.

TO INCLUDE EQUALITY FLORIDA IN YOUR WILL

The starting point for making a bequest to Equality Florida is to create a valid will. To ensure that your will is valid and enforceable under the law, we strongly recommend that you consult with an attorney when creating yours.

To make a bequest to Equality Florida, you will need to use the correct language in your will: "I hereby give and bequeath [cash amount, percentage amount, or property you are giving] to Equality Florida Institute, Inc. for its general purposes." To ensure that your wishes are followed exactly, we suggest including Equality Florida's full name and address in your will:

Equality Florida Institute, Inc. P.O. Box 13184, St Petersburg, FL 33733 Federal Tax ID #: 59-3435235

LEGACY OF EQUALITY SOCIETY MEMBERSHIP BENEFITS

As a member of the Legacy of Equality Society, you will be recognized on Equality Florida Legacy of Equality Society materials distributed locally and across the state. Members will also be invited to special Legacy of Equality Society receptions where we will have the opportunity to recognize you and thank you for your planned support of Equality Florida.

JOIN THE LEGACY OF EQUALITY SOCIETY

To join the Legacy of Equality Society, simply include Equality Florida in your estate plan and notify us that you have done so. You can register at equalityflorida.org/legacy or by emailing us at legacy@equalityflorida.org or by phone at 813-870-3735 or by sending notification to Equality Florida Institute, Inc. P.O. Box 13184, St Petersburg, FL 33733.



For more information, please contact:

EQUALITY FLORIDA INSTITUTE - P.O. BOX 13184, ST PETERSBURG, FL 33733
hr@equalityflorida.org (813) 870-3735 equalityflorida.org/legacy

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There are many ways to leave your own legacy of equality. We encourage you to always consult a professional to insure that your charitable plans are fulfilled.

THESE ARE JUST A FEW OPTIONS:

- **Banking or Brokerage Assets**
You can name Equality Florida as the after death beneficiary. You need to notify your bank or brokerage firm to fill out the proper paperwork.
- **Charitable Bequest in Your Will or Trust**
You can create a permanent legacy by leaving a bequest of a specific amount of cash, a percentage of your estate or the remainder of your estate to Equality Florida.
- **Gift Using Appreciated Assets or Cash**
When you create a legacy with a current gift of cash or other property, your fund may be used to pay an annual gift to Equality Florida.
- **IRA or Qualified Retirement Plan**
Naming Equality Florida as the designated beneficiary of your IRA or qualified retirement plan such as 401(k) or 403(b) plans can save on income and estate taxes while providing support to continue work that is close to your heart.
- **Life Insurance Policy**
Life insurance is an advantageous and inexpensive way to create a legacy. You can purchase a new policy naming Equality Florida as owner and beneficiary, or you can transfer an existing policy and name Equality Florida as owner.

The information in this guide is not intended as legal advice. For more information about life-planning vehicles and making a planned gift to Equality Florida, we encourage you to consult with a professional who is familiar with estate law. For help finding a professional in your area, contact us and we will be glad to provide you with a list.



All net proceeds directly benefit Equality Florida Institute, a tax exempt 501c3 non-profit organization, which leads the march for marriage equality and the passage of non-discrimination laws throughout Florida.

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION FOR EQUALITY FLORIDA INSTITUTE MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES AT WWW.FLORIDAConsumerHELP.COM OR BY CALLING TOLL-FREE WITHIN FLORIDA (1.800.435.7352). REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE. REGISTRATION #CH7992.

The Legacy of Equality Society is a growing group of Equality Florida members and supporters who are making a commitment to the long range and lasting success of our mission to end discrimination based on sexual orientation and gender identity by including Equality Florida as a beneficiary in their estate planning.

Estate planning is a smart move for everyone, regardless of age or income and is essential for ensuring your estate goes to the loved ones and charitable organizations of your choosing.

For more information, please contact:

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