

## Planned Giving

Leaving a gift to the NEA Foundation in your will or by beneficiary designation is a great way to invest in the future of public education and make a lasting difference for the students and educators of tomorrow.

## How You Benefit

- You decide how much to give—no gift is too small.
- Your gift costs you nothing now.
- You retain control of your assets during your lifetime and, if your circumstances change, you can modify the gift.
- You may choose to keep your gift anonymous.
- You can leave a gift in honor or memory of someone who inspired your commitment to education.
- You will be remembered as someone who made our public schools better for students today and for future generations.

## Choose the Right Gift for You

### GIFTS BY BENEFICIARY DESIGNATION

Make a Difference Simply by Signing Your Name NEA Foundation supporters like you frequently tell us, “I wish I could do more.” You can! You can help support educators and students for many years to come by simply naming the NEA Foundation as a beneficiary of any of these types of accounts:

- Retirement Accounts
- Life Insurance Policies
- Bank or Brokerage Accounts
- Certificates of Deposit
- Donor Advised Funds
- And it’s easy to do



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## MAKE THE MOST OF YOUR IRA

If you are over age 70 ½, you can save on income tax when making donations to qualified charities, such as the NEA Foundation, directly from your Individual Retirement Account (IRA).

## GIFTS IN YOUR WILL

Leave a Gift that Costs You Nothing Now You can take care of family first, and include the NEA Foundation to receive a specific amount or percentage of your estate. Or, name us a contingent beneficiary, so educators and students are next in line after your loved ones.

## PLEASE TELL US ABOUT YOUR GIFT!

If you leave a gift for the future of education, we welcome the chance to say thank you. Plus, you can set an example and inspire others to consider this type of gift to the NEA Foundation. With a gift that costs you nothing now, you can forever be remembered as someone who believes in the power of public education.

## WE'RE HERE TO HELP

To notify us of a legacy gift you have planned, or to discuss the best gift option for you, please contact Meg Porta at 202-822-7803 or at [mporta@nea.org](mailto:mporta@nea.org).

## How to Leave a Gift

### MAKE YOUR MARK

Leaving a gift is easy and rewarding. Many people are surprised to learn how easy it is to make a lasting difference for the charities they love by leaving a gift in their will or by naming them as beneficiaries of a retirement plan or and other financial account. Benefits to You:

- You can take care of your family first.
- Your gift costs you nothing now.
- You are not locked in and can change your mind if circumstances change

## HOW TO NAME THE NEA FOUNDATION AS A

**BENEFICIARY** Support public education for years to come simply by signing your name on a beneficiary designation form.

Step 1: Obtain the appropriate forms on the account website or by calling the customer service number on your statement to request that a form be mailed to you.



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Step 2: Write in the NEA Foundation for the Improvement of Education as a beneficiary and use our Tax Identification Number (TIN): 23-7035089 where the form asks for a social security number.

Step 3: Mail in the form to your administrator and let us know about your gift so we can say thank you and ensure your wishes are fulfilled. Simply email Chief Operating officer Meg Porta at [mporta@nea.org](mailto:mporta@nea.org).

## **HOW TO LEAVE A GIFT IN YOUR WILL**

Support public education for years to come by leaving a gift to the NEA Foundation in your will.

Step 1: Share this sample language with your lawyer or advisor.

I give [\_\_ percent of my estate or description of asset or \_\_\_ dollars] to the NEA Foundation for the Improvement of Education, 1201 Sixteenth Street, NW, Suite 416, Washington, DC 20036, TIN: 23-7035089 for its unrestricted charitable use and purpose.

Step 2: Let Chief Operating Officer, [mporta@nea.org](mailto:mporta@nea.org), know about your gift so we can say thanks and help ensure your wishes are fulfilled.

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