



Vermont Public Interest Research Group

LEAVE A LEGACY

Bequests

Making VPIRG or VPIREF a beneficiary in your will or living trust is a great way to help protect Vermont's air, water, health, and people for generations to come.

Making a bequest is easy; you can decide to do it at any age by adding to an existing will or drafting a new one.

Bequests to VPIRG – a registered 501c(4) organization – are not deductible for the purposes of federal estate tax, but go to fund our critical advocacy and lobbying activities throughout the course of the year.

Tax-deductible bequests may be made by alternatively naming Vermont Public Interest Research and Education Fund (VPIREF), VPIRG's 501c(3) charitable education and outreach arm, in your bequest.

As an alternative to amending your current will, consider naming VPIRG or VPIREF as a beneficiary of your retirement plan. Simply contact your plan administrator for a change of beneficiary form, and designate VPIRG for a percentage of the assets which remain in the plan at your death.

A Few Planning Ideas...

These are just a few of the ways that you can leave a legacy at VPIRG. Always discuss changes to your estate with your lawyer or estate planner – nothing written here should take the place of legal advice from a qualified professional you trust.

Stay flexible by using percentages or leave a fixed dollar amount:

The value of personal assets can rise and fall. A bequest stated as a percentage will automatically adjust regardless of future circumstances. For example:

- "I leave 10% of my estate to the Vermont Public Interest Research Group (Tax Identification Number: 03-0228267)"
- "I leave 10% of my estate to the Vermont Public Interest Research & Education Fund (Tax Identification Number: 51-0163801)"

You may also leave a fixed dollar amount. For example:

- "I leave \$50,000 to the [Vermont Public Interest Research Group / Vermont Public Interest Research & Education Fund]"

Again, for either VPIRG or VPIREF, be sure to include the Tax Identification Number for the arm of the organization you choose to name – being as clear as possible ahead of time will ease the process for your loved ones later down the road.

Your attorney should assist you in crafting specific bequest language. However, some language to consider is as follows:

"I give to the Vermont Public Interest Research Group, a Vermont nonprofit organization that is recognized as exempt from tax under Section 501c(4) of the Internal Revenue Code, as amended, with its principal offices at 141 Main Street, Suite 6 in Montpelier, Vermont, [all (or ____ percent) of my residuary estate] **OR** [the sum of \$_____] to be used for its general purposes."