

Leaving a Legacy

At some point, many of us face the fact that we will not be here walking this good green earth forever. Sometimes we are lucky to get a wake-up call to remind us that it always better to leave a plan; a plan where your values and assets will continue to enrich the lives of future generations.

A bequest from a will or a trust distribution to the Midwest Organic and Sustainable Education Service (MOSES) is fully deductible for federal estate tax purposes, and there is no limit on the deduction your estate can claim. In addition, the gift is usually exempt from state inheritance taxes. Any gift will benefit MOSES tomorrow just as you intend it to today.

Other benefits:

- You can provide for your family first.
- Your assets remain in your control during your lifetime.
- You can modify your bequest if your circumstances change.
- You receive an estate tax deduction for the full amount of bequest.

Sample bequest language:

Specific amount: "I give to the Midwest Organic and Sustainable Education Service, located in Spring Valley, Wisconsin, the sum of \$_____ to be used by the 501(c)(3) nonprofit wherever the need is greatest."

Portion of estate: "I give to the Midwest Organic and Sustainable Education Service, located in Spring Valley, Wisconsin, ____% of my estate to be used by the 501(c)(3) nonprofit for the wherever the need is greatest."

Residual estate (after other bequests are named): "I give to the Midwest Organic and Sustainable Education Service, located in Spring Valley, Wisconsin, the rest and residue of my estate to be used by the 501(c)(3) nonprofit wherever the need is greatest."

Contingent Bequest: "If (insert name or names) does not survive me, I give and devise to the Midwest Organic and Sustainable Education Service, located in Spring Valley, Wisconsin, all the rest, residue, and remainder of my estate, both real and personal, to be held, administered, and used by the Board of Directors in its sole discretion deem appropriate."

If you decide to leave MOSES in your plans, we would love to hear from you so we can thank you for your good work right now.

You can reach Faye Jones, MOSES Executive Director, at 715-778-5775 or faye@mosesorganic.org.

