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A Legacy as Vast as the Ocean:

A Gift in Your Will or by Beneficiary Designation



A Message from Janis Searles Jones, CEO

At Ocean Conservancy, we are united by one belief—that what happens to the ocean impacts all of us, and that it is our privilege and duty to find long-term science-based solutions that promote a healthy ocean, abundant wildlife and thriving coastal communities. And together, we hold this duty in trust for future generations.



The ocean is our responsibility, but we can't protect it alone—we need to join forces with you and people around the world to keep our ocean and our coastal communities flourishing and prosperous.

Like all of us here at Ocean Conservancy, my love for the ocean runs deep.

The ocean has played a major role in my life since I was a kid. I still remember my first beach field trip with Mrs. Terwilliger, our community naturalist. I'll never forget how she would show up in her pale blue VW bus to teach us about local wildlife, everything from bird calls to identifying snakes. Her favorite message for children was, "This is my country. Wherever I go, I will leave it more beautiful than I found it."

Now, I think of her as I teach my daughter about the negative impact plastics have on the ocean and all the amazing animals in it, and how she can make a difference.

I am immensely grateful that so many of our supporters share my passion for the ocean. And I am particularly thankful for the members of our Ocean Legacy Society, who have each made a deeply personal commitment to a healthy ocean future by including a gift in their will or estate plans for Ocean Conservancy.

Thank you so much for considering this special way of giving.

Janis

You have the ability to help ensure a healthy ocean for generations to come by including a gift to Ocean Conservancy in your will, or by naming Ocean Conservancy a beneficiary of your retirement plan, life insurance policy or other financial account.

A healthy ocean means:

- Beautiful coastlines and vibrant marine wildlife;
- Thriving and resilient coastal communities; and
- The irreplaceable sense of wonder and joy we find in contemplating the sea.

We are grateful to the members of our Ocean Legacy Society, who have already made a commitment to protect the ocean for future generations. Please join this community of supporters who have a shared vision of a healthy ocean future by including a gift to Ocean Conservancy in your will.

When you include a gift to Ocean Conservancy in your will or name Ocean Conservancy as a beneficiary of your retirement plan, life insurance or other financial account, you establish a living legacy for the ocean.

Four Simple Steps

Creating or updating your future plan is one of the most important things you can do to care for yourself, your family and the causes that are most meaningful to you. It doesn't have to be complicated, and you can always review and update your plans as your life circumstances change:

- Think about the loved ones and causes you'd like to support.
- Update your beneficiary designations on your financial accounts.
- Create a will or codicil to an existing will that reflects your wishes and values.
- Feel the peace of mind that comes with knowing your loved ones and favorite causes will be cared for.

For many people, deciding whether to include a gift to a charity that has been particularly meaningful to them is an important part of their planning.



Mary Kay Neumann

Ocean Legacy Society member Mary Kay Neumann is an artist whose vibrant watercolors capture the extravagant beauty of the natural world, a psychotherapist who understands the healing power of art and an activist who uses her work to advocate for the environment. In addition to her art and activism, Mary Kay has included Ocean Conservancy in her will. “I love their work, and together we can be a voice for the ocean and the future.”

She believes that one way to encourage others to act in the face of environmental challenges that can seem overwhelming is to encourage them to find one creature, plant or life-form that they cherish. “Find out what that is, and fight for it. If everyone works to help one thing that they love, together our efforts will make an impact.”

A Gift in Your Will

Here is sample language you can share with your attorney. You have several options to create a gift that meets your needs and the needs of your family, including:

- A gift of a specific amount or a particular asset;
- A percentage of your estate;
- Funds that remain after loved ones are provided for; or
- A contingent gift that only comes to Ocean Conservancy if your other beneficiaries do not survive you or other specific gifts cannot be fulfilled.

Language for a Residual Gift: A residual bequest benefits Ocean Conservancy after your estate expenses and specific bequests are paid:

“I give and devise to Ocean Conservancy, a Washington, D.C., nonprofit corporation (Tax ID 23-7245152) all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support.”

Language for a Specific Gift: Naming Ocean Conservancy as a beneficiary of a specific amount from your estate is simple:

“I give and devise to Ocean Conservancy, a Washington, D.C., nonprofit corporation (Tax ID 23-7245152) the sum of \$_____ to be used for its general support.”

Language for a Contingent Gift: Ocean Conservancy can be named as a contingent beneficiary if one or more of your specific bequests cannot be fulfilled:

“If (insert name) is not living at the time of my demise, I give and devise to Ocean Conservancy, a Washington, D.C., nonprofit corporation (Tax ID 23-7245152) the sum of \$_____ (or all or a percentage of the residue of my estate) to be used for its general support.”

Gifts by Beneficiary Designation

Many assets can be used to make a meaningful gift to Ocean Conservancy. You do not need to update your will; you can express your values by simply updating your beneficiary designation forms. Because we are tax-exempt, 100% of your gift will go to ensuring a healthy, thriving ocean for generations to come.

Assets you can use to make a gift to Ocean Conservancy are often called transfer on death (TOD) assets or payable on death (POD) assets, and include:

- Retirement plan funds
- Life insurance policies
- Bank and brokerage accounts and other financial accounts
- Donor-advised funds

**For any of these gifts, you will need Ocean Conservancy’s
legal name and Tax ID number:**

**Ocean Conservancy
Tax ID 23-7245152**

Gifts of Retirement Plan Assets

You can designate Ocean Conservancy as a full or partial beneficiary of your IRA, 401(k), 403(b) or other tax-deferred plan. If you designate Ocean Conservancy as beneficiary of your retirement plan, you can:

- Designate other, less heavily taxed assets to your family.
- Change your beneficiaries at any time, retaining maximum flexibility.
- Because we are tax-exempt, 100% of your gift will support Ocean Conservancy's mission.

Check with your retirement account manager or financial institution's website to obtain a beneficiary designation form.

Gifts of Life Insurance

Many of us have life insurance policies that have long since served their purpose. Perhaps you purchased a policy when your children were young—but now the kids are grown and doing well—or you have a policy your parents purchased for you years ago. Insurance policies that have outlasted their original purpose are a wonderful way to create your ocean legacy.

It's easy:

1. Request a change of beneficiary form from your life insurance company and make Ocean Conservancy a beneficiary. You retain the flexibility to change your beneficiaries at any time.
2. Sign over a fully paid policy. You may be allowed a tax deduction for your generosity.



Jan and Tom Schuler

From their commitment to their faith and ministry, to their unwavering advocacy on behalf of the ocean and the deep love they have for their family, Tom and Jan Schuler embody the principles of living an intentional, purposeful life.

Ocean Conservancy supporters for more than 25 years and members of the Ocean Legacy Society, Tom and Jan both grew up near the ocean. "We're a diving family," shares Tom. "We travel to the ocean and we walk the beaches. We always try to leave it a little better when we leave." But the Schulers know that individual action must be combined with action on a larger scale: "We want to support this work on a much more macro level. We aren't policy experts or lobbyists. There's where Ocean Conservancy comes in."

Tom and Jan carry their thoughtful intentionality to their philanthropy. "We believe that there should be a significant focus of life on something bigger than yourself or the four walls you live in." As members of the Ocean Legacy Society, Tom and Jan have included Ocean Conservancy in their estate plans and they encourage other supporters to join them. "It's a legacy for our children, and for the oceans, and the future."

Donor-Advised Funds

The final distribution of contributions remaining in your donor-advised fund after your lifetime can be designated when you create your fund or update your fund succession plans. Please consider naming Ocean Conservancy as a beneficiary of your account. You may even designate us to receive a portion of the account value, leaving the remaining portion for your children or grandchildren to continue your philanthropic legacy.

Bank, Brokerage and Other Financial Accounts

You can easily gift funds remaining in other financial accounts by updating beneficiary designation forms for these accounts. Your financial institution can assist you and will provide an easy-to-complete form.

The Future Your Gift Makes Possible

For almost 50 years, Ocean Conservancy has worked to protect vital ecosystems, defend critical legislation, enforce accountability of leaders and legislators and rally the world's largest effort to remove trash from our beaches, waterways and oceans. Because a healthy ocean means a healthy planet.

A gift in your will or by beneficiary designation will help support:

- **Reducing Ocean Plastics:** Through the International Coastal Cleanup™, we have kept more than 344 million pounds of trash out of the ocean. But to solve the ocean plastic crisis, we must reduce the amount of plastic we produce and use, change corporate and individual behaviors, and advocate for critical policy solutions. With your help, we can solve the ocean plastics crisis together.
- **Confronting Climate Change:** Scientists say that we need to limit warming to 1.5 degrees Celsius in order to maintain a livable planet, and ocean-based climate solutions can get us up to one-fifth of the way there. We are bringing the power of the ocean to the global fight against climate change.
- **Protecting the Arctic:** The Arctic regulates our climate and is a vital freshwater source for the entire planet, and its coastal communities continue to rely on a healthy ocean to sustain a traditional way of life and as a vital source of food security. But the region is warming three times as fast as the rest of the planet. The Arctic's future is uncertain, and choices made today will affect the region for years to come. You can help us advance critical solutions for the Arctic and fight for those policies.

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- **Sharing the Seas:** The ocean is getting busier by the day, and ecosystems are changing at unprecedented rates due to climate change and increased pollution. By working with Congress, coastal managers and the current administration, we are making communities more resilient to climate impacts and create better outcomes for the ocean and the wildlife that calls it home.
 - **Healthy Fish for a Healthy Ocean:** Warming and acidifying waters, overfishing and increased demand on ocean resources threaten healthy fish populations. Ocean Conservancy is responding to these challenges by working directly with affected fishing communities to advance new solutions to balance needs for food, human well-being and ecosystem health.



Download our other complimentary planning publications at
legacy.oceanconservancy.org/resources

To leave a gift to Ocean Conservancy, we recommend you use this language:

Ocean Conservancy, Tax ID 23-7245152, with its principal office in Washington, DC.

We Are Here to Help

We welcome the opportunity to assist you as you consider a future gift to Ocean Conservancy. We understand that leaving Ocean Conservancy a gift in your will or trust or by naming us one of your beneficiaries takes careful consideration. Contact us about creating your ocean legacy.

If you have already left a gift for Ocean Conservancy, we hope you will let us know. We would like to thank you and welcome you to the Ocean Legacy Society, our way of recognizing the exceptional individuals who have made protecting the ocean a part of their lasting legacy.



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This information is not intended as legal, accounting or other professional advice. For assistance in charitable planning, consult an attorney for legal advice or obtain services of a qualified professional.

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