



## Yolo Basin Foundation's Planned Giving Toolkit

Yolo Basin Foundation is pleased you are interested in contributing to our organization in a way that can maximize your giving potential. Your support will enable the Foundation to continue to expand the public's appreciation and stewardship of the wetlands and wildlife in the Yolo Basin through education and innovative partnerships. This toolkit provides information on ways you can make a gift to the Foundation, some of which may be at a lower cost to you. Please consult with your attorney or tax professional about your options and the requirements.

Here are three ways to give:

- **Gift of Stock, Mutual Funds or Bonds** – Make a gift by transferring stock, mutual funds or bonds directly to Yolo Basin Foundation. You may be able to avoid paying capital gains taxes on the appreciation and receive a tax deduction on the full value of your gift.
- **Legacy Giving** – The most common legacy is a gift through your will or trust. You will clearly designate what you intend to give to the Yolo Basin Foundation. For example, you may bequest a specific dollar amount or make a donation through your Charitable Remainder Trust (CRT). You can also designate Yolo Basin Foundation as a beneficiary of your life insurance policies and IRAs. Designating Yolo Basin Foundation as a direct beneficiary of your IRA may have several benefits including tax benefits to your non-charitable beneficiaries.
- **IRA Distribution** – A Qualified Charitable Distribution (QCD) is a direct gift from your Individual Retirement Account (IRA), and if transferred correctly, may lower your taxable income. These gifts, from your qualified IRA accounts, must be made by donors age 70 ½ or older. Charitable giving of this type (up to \$100,000 per tax year) may count towards your Requirement Minimum Distribution (RMD).

For next steps or more information, consult with your attorney or tax professional about your options and their requirements.

### Yolo Basin Foundation Contact

Martha Diepenbrock, Executive Director

Yolo Basin Foundation

P.O. Box 943 -- Davis, CA 95617

[martha@yolobasin.org](mailto:martha@yolobasin.org)

530-757-3780

**Thank you for your support of the Yolo Basin Foundation!**

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## Gifts of Stock, Mutual Funds or Bonds to Yolo Basin Foundation

Thank you for planning a transfer of stock, mutual funds or bonds to Yolo Basin Foundation. With this transfer, you may be able to avoid paying capital gains taxes on the appreciation and receive a tax deduction on the full value of the gift. This gift can help you meet your philanthropic goals while potentially enhancing your tax benefits. Please contact your financial advisor to learn about the benefits and requirements.

### How to Make the Transfer

- Notify your broker in writing that you would like to make a charitable gift to Yolo Basin Foundation.
- Notify Yolo Basin Foundation's Executive Director, Martha Diepenbrock, of the transfer because your name will not be included in the transfer to our broker.

Martha Diepenbrock, Executive Director  
Yolo Basin Foundation  
P.O. Box 943  
Davis, CA 95617  
*martha@yolobasin.org*  
530-757-3780

**Yolo Basin Foundation's Federal Tax Identification Number (EIN)**  
68-0230311

### Instructions for Your Broker

Have your broker transfer your shares, mutual funds or bonds to:

Securities America  
Account Number: 73U271035  
ACAT Transfer Number: 0443

### Questions About the Transfer?

Contact Yolo Basin Foundation's Advisor:

Jim Belenis  
Tridea Advisors  
*jim.belenis@trideaadvisors.com*  
530-564-4236

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## Legacy Giving

Thank you for your consideration of making a legacy gift to Yolo Basin Foundation, as you work to achieve your philanthropic goals. Through your support, the Foundation will be able to continue its mission of expanding the public's appreciation and stewardship of the wetlands and wildlife in the Yolo Basin through education and innovative partnerships. There are many ways to leave a legacy. Contact your attorney to determine which legacy gifts are best for you. Below, you may find some useful information.

### **Gift Through your Will or Trust**

- The most common legacy gift is a donation through your will or trust. You will clearly state what you intend to give to the Yolo Basin Foundation. For example, you may bequest a specific dollar amount or establish a Charitable Remainder Trust (CRT). Consult with your attorney on how to properly write your bequest or establish a CRT.

### **Make Yolo Basin Foundation a Beneficiary of your Individual Retirement Accounts (IRA) or Life Insurance Policies**

- You may choose to designate Yolo Basin Foundation as a beneficiary of your IRAs or life insurance policies. Designating Yolo Basin Foundation as a direct beneficiary of your IRA may have several benefits including tax benefits to your non-charitable beneficiaries. These designations can easily be made through support from your IRA administrator or insurance policy holder.

### **Yolo Basin Foundation's Federal Tax Identification Number (EIN)**

- 68-0230311

### **Yolo Basin Foundation's Contact Information**

- Martha Diepenbrock, Executive Director  
Yolo Basin Foundation  
P.O. Box 943 Davis, CA 95617  
*martha@yolobasin.org*  
530-757-3780

**Thank you for your support of the Yolo Basin Foundation!**



## Charitable Gift from Your Individual Retirement Account (IRA)

Thank you for planning a contribution to Yolo Basin Foundation with a gift from your Individual Retirement Account (IRA). This Qualified Charitable Distribution (QCD) from your IRA is a direct gift and, transferred correctly, is excludable from your income. These gifts may only be made by donors age 70 ½ or older, from qualified IRA accounts. Charitable giving (up to \$100,000 per tax year) may count towards your Required Minimum Distribution (RMD). For more information, please contact your tax professional or financial advisor.

The attached letters may help you make a transfer to Yolo Basin Foundation directly from your IRA.

- **Letter from Plan Owner to IRA Administrator**

To initiate the transfer, please complete the underlined portions of the enclosed letter and send it to your IRA Plan Administrator.

- **Letter from Donor to Yolo Basin Foundation**

Upon initiating the transfer, please complete the underlined portions on the enclosed letter and send it to Yolo Basin Foundation:

Martha Diepenbrock, Executive Director at:

*martha@yolobasin.org*

or

Yolo Basin Foundation

Attn: Martha Diepenbrock

P.O. Box 943

Davis, CA 95617

**Thank you for your support of the Yolo Basin Foundation!**

**FROM PLAN OWNER TO YOUR IRA ADMINISTRATOR**

Date: \_\_\_\_\_

IRA Plan Administrator: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**RE: Request for Charitable Distribution from Individual Requirement Account**

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account # \_\_\_\_\_ to Yolo Basin Foundation. In your communication with Yolo Basin Foundation, please include my name and address as the donor of record in connection with the check/transfer. Please send me a copy of this transaction.

- Please issue a check in the amount of \$ \_\_\_\_\_ payable to:  
Yolo Basin Foundation (Federal Tax ID#: 68-0230311).**

Mail check to:

Yolo Basin Foundation  
 Attn: Martha Diepenbrock, Executive Director  
 P.O. Box 943  
 Davis, CA 95617

- Please wire funds in the amount of \$ \_\_\_\_\_ payable to:  
Yolo Basin Foundation (Federal Tax ID#: 68-0230311) to:**

First Northern Bank – 434 Second Street, Davis, CA 95616  
 Name on the Account: Yolo Basin Foundation – Account #: 3104540  
 Routing #: 121105156  
 Reference Name: (Donor Name - IRA Rollover)

Yolo Basin Foundation’s contact is Martha Diepenbrock, Executive Director - (530) 757-3780; *martha@yolobasin.org*.

Thank you for your assistance.

Plan Owner’s Signature: \_\_\_\_\_

Plan Owner’s Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

**FROM DONOR TO YOLO BASIN FOUNDATION**

Date: \_\_\_\_\_

Martha Diepenbrock, Executive Director  
Yolo Basin Foundation  
P.O. Box 943  
Davis, CA 95617

Dear Ms. Diepenbrock:

It is my pleasure to inform you that I have requested a Qualified Charitable Distribution (QCD) from my Individual Retirement Account (IRA), made payable to Yolo Basin Foundation, in the amount of \$ \_\_\_\_\_ from my plan trustee/administrator,

\_\_\_\_\_  
(Name of Plan Administrator)

Upon your receipt of payment from my trustee/administrator, please send me a written acknowledgement that states the amount of my gift, that no goods or services were transferred to me by your organization in consideration for this gift, and that my gift will not be placed in a donor advised fund or in a supporting organization fund, nor will it fund a life income agreement.

Sincerely,

\_\_\_\_\_  
Plan Owner's Signature

Plan Owner's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_