

Thank you for your interest in the Legacy of Equality Society, Equality Florida's planned giving recognition program.

This short brochure provides an overview of the program. You can learn more by visiting www.equalityflorida.org/legacy, calling (813) 870-3735, or sending an email to legacy@equalityflorida.org.

HELP SECURE EQUALITY FOR FUTURE LGBTQ FLORIDIANS

We know from experience that the path toward full legal and lived equality for LGBTQ Floridians will be full of challenges for the foreseeable future. Equality Florida has been on the forefront of this fight for twenty-five years, and we will continue to be on the forefront for years to come.



A planned gift to Equality Florida¹ helps ensure that we will be there for future generations of LGBTQ Floridians. Your gift will support programs that secure equality for all - that's a very special legacy! And by giving this way, you will join others like you in a group of forward-thinking donors who have made long-lasting commitments to equality.

WAYS TO GIVE

There are a number of ways to include Equality Florida in your estate plan:

- **Provide for Equality Florida in your Will or Trust.** You can transfer many types of assets (cash, cryptocurrencies, appreciated securities, qualified retirement plans, real and personal property) directly through your Will or Trust. To make a bequest in your Will, include the following charitable donation language: "I hereby give and bequeath [specific cash amount, percentage amount, or specific property] to Equality Florida for its general purposes."² To provide for us in a Trust, include language that directs the Trustee to distribute the chosen asset(s) to Equality Florida.



- **Make Equality Florida the beneficiary of your life insurance or retirement assets.** Most life insurance policies and retirement contracts allow for you to designate one or more beneficiaries that will receive these assets upon your death. Depending on your circumstances, using these planned giving vehicles can provide tax benefits during your lifetime (again, consult a tax specialist). To designate our organization as a beneficiary, include Equality Florida in the appropriate beneficiary designation form.

Prior to finalizing your charitable planned gift, please consult an attorney and/or a financial professional - we are not attorneys. Also, consult our Gift Acceptance Policy (we will be happy to provide a copy). Whenever possible, contact us prior to finalizing any planned gift to Equality Florida, so that we help craft a plan that reflects your interests and ensure that your proposed gift meets our basic criteria.

ABOUT THE LEGACY OF EQUALITY SOCIETY

Notify us of a planned gift you've made to Equality Florida and you will automatically join our signature planned giving recognition program - the Legacy of Equality Society. Members come from all areas of Florida.

Membership in the Legacy of Equality Society is free. Once you become a member, your name is added to the Society's donor honor roll on the Equality Florida website (unless you request anonymity), and you are sent a confirmation thanking you and outlining program benefits. Legacy of Equality Society members receive a number of exclusive benefits, all of which are described on our website: www.equalityflorida.com/legacy.

ABOUT EQUALITY FLORIDA

Equality Florida is the largest civil rights organization dedicated to securing full equality for Florida's LGBTQ community. We have a long history of successfully advocating for, and working in the interests of, LGBTQ persons throughout our state. Our work focuses on:

- **Public Policy:** passing pro-equality bills and blocking anti-LGBTQ legislation.
- **Safe & Healthy Schools:** assisting school districts in implementing comprehensive best practices and policies to support and affirm LGBTQ students.
- **Transgender Community Advocacy & Education:** representing and supporting Florida's transgender community through diversity trainings, advocacy, and resource provisions.
- **HIV Advocacy & Education:** helping to curb the rate of new HIV transmissions in Florida through statewide public education campaigns and policy work.
- **Equality Means Business & Open Doors:** highlighting pro-equality businesses that have demonstrated their commitment to valuing and proactively including all employees.
- **Healthcare Equity:** working with healthcare facilities to ensure they provide the compassion and sensitivity that LGBTQ patients deserve.

For more information about our work, please visit www.equalityflorida.org.

We hope that you will consider joining the Legacy of Equality Society! Become part of an important group of forward-thinking donors. For more information and to join, please email legacy@equalityflorida.org or call 813-870-3735.

"We hope our legacy gift helps Equality Florida continue the work they have been doing. And as allies, we think it is important to support the work of Equality Florida because we're all in this together and we need to help each other out."

Jennie and Ken O'Leary, St. Petersburg Legacy of Equality Society Members

¹ "Equality Florida" refers collectively to Equality Florida Institute, Inc. (a 501(c)3 organization, TIN 59-3435236) and Equality Florida Action, Inc. (a 501(c)4 organization; TIN 47-1338104). Gifts to Equality Florida Institute, Inc. are tax deductible to the extent permitted by applicable laws. Gifts to Equality Florida Action, Inc. are not tax deductible. ² We encourage you to consider directing your gift to Equality Florida Action, Inc., to support our essential work of advocating for LGBTQ rights with legislative and other government bodies. Contact us for more information.

Equality Florida

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