



Now and for the Future: **Your Clean Water Guide to Wills and Bequests**

Getting Started:

Now is the perfect time to make Clean Water part of your long-term plans. Our water resources are precious. Your Legacy Gift for Clean Water will make a difference, now and for the future. This guide gives you the information you need to include a clean water bequest as part of your written will* — one of the easiest Legacy Gift options available to you.

You can start by considering two basic questions:

- 1. Which Clean Water organization will you support?*
- 2. What type of bequest makes sense for you?*

Clean Water Action is a 501(c)(4) nonprofit which supports legislative lobbying and grassroots campaigns; contributions are not tax-deductible.

Clean Water Fund is a 501(c)(3) nonprofit which supports research, education, outreach and action; contributions are tax-deductible to the full extent allowed by law.

Nearly everyone can benefit from having a will, including people of very modest means. More often than not, tax deductibility for your legacy gift — made by including a clean water bequest in your will — will not matter. The planning professional who helps you with your will can help you determine whether or not tax deductibility is important in your particular situation.

Legacy Gifts are welcomed by both Clean Water Action and Clean Water Fund:

If tax-deductibility is not a factor in your situation, you may choose to direct your bequest to Clean Water Action, to help the fight for strong clean water laws and their enforcement. If your advisor recommends a legacy gift to Clean Water Fund (potential tax advantages for some estates) you may do so with confidence, knowing your gift will make a difference.

TIP: Be sure your will is precise in describing the organization(s) to receive Legacy Gifts under your will. This can simplify your will's execution and make sure your charities receive your Legacy Gifts more quickly.

Clean Water Action

(not tax-deductible)

1444 Eye Street, NW, Suite 400
Washington, DC 20005
tax I.D. #23-7128611

Clean Water Fund

(tax-deductible to the extent allowed by law)

1444 Eye Street, NW, Suite 400
Washington, DC 20005
tax I.D. #52-1043444



**Clean Water Action and Clean Water Fund recommend that you seek assistance from qualified counsel, such as a lawyer with estate planning expertise, to help you prepare or modify your written will to include Your Legacy Gift for Clean Water. The unique characteristics of your financial and estate planning circumstances will determine whether tax deductibility should be a consideration for bequests in your will. Your advisor can also help you determine which type of bequest will best fulfill your Clean Water Legacy Gift intentions and craft the appropriate written bequest instructions.*

Types of Bequests:

Your Clean Water Legacy Gift by bequest can take one of three forms. Or, you could decide to implement some combination of these options in your will:

Specific Bequest: Your written will designates a specific percentage, a specific dollar amount, or the specific property/asset you want for your bequest. Designating a percentage rather than a specific dollar amount can reduce the need to modify your Legacy Gift plans as the value of your estate changes.

Residual Bequest: Your will instructs that once all taxes, legal/accounting costs and other personal or charitable bequests are paid, the amount that is left (the “residue”) goes to the organization(s) you specify.

Contingent Bequest: Your will can specify certain conditions that will initiate or add to a Legacy Gift bequest. This can help you to address different kinds of personal “what if” scenarios. For example, if your will includes a bequest to a family member who is no longer living at the time of your own death, your contingent bequest could make sure that amount then becomes a Legacy Gift for your favorite Clean Water cause.

Sample Bequest Language:

Example: Specific Bequest – Percentage

“I hereby give and bequeath to Clean Water Fund, a non-profit District of Columbia corporation whose principal office is located at 1444 Eye Street, NW, Suite 400, Washington, DC 20005, tax I.D. #52-1043444, % of my estate to be used for its general purposes.”

Example: Specific Bequest – Dollar Amount

“I hereby give and bequeath to Clean Water Fund, a non-profit District of Columbia corporation whose principal office is located at 1444 Eye Street, NW, Suite 400, Washington, DC 20005, tax I.D. #52-1043444, the sum of \$ to be used for its general purposes.”

Example: Specific Bequest – Designated Asset

“I hereby give and bequeath to Clean Water Fund, a non-profit District of Columbia corporation whose principal office is located at 1444 Eye Street, NW, Suite 400, Washington, DC 20005, tax I.D. #52-1043444, to be used for its general purposes.”

[fill in written description of investment, insurance, bank account, real property or other assets]

Example: Residual Bequest

“I hereby give and bequeath to Clean Water Fund, a non-profit District of Columbia corporation whose principal office is located at 1444 Eye Street, NW, Suite 400, Washington, DC 20005, tax I.D. #52-1043444, all the rest, residue and remainder of my estate, both real and personal, after providing for the specific provisions of this Will, to be used for its general purposes.”

[It is possible to substitute “ % of the rest” for “all of the rest.”]

For more information:

Please let us know about your Clean Water Legacy Gift plans so that we may thank you! For additional information or assistance with your bequest, donations of appreciated assets or other Legacy Gift options, contact Jonathan A. Scott, Director of Legacy Gifts: legacy@cleanwater.org or 202.330.2379.



1444 Eye Street, NW, Suite 400, Washington, DC 20005 • T: 202.895.0420
Facebook: [facebook.com/CleanWaterAction](https://www.facebook.com/CleanWaterAction) • Twitter: [@CleanH2OAction](https://twitter.com/CleanH2OAction) • E: cwa@cleanwater.org
www.cleanwateraction.org • www.cleanwaterfund.org • www.cleanwater.org

