

PLANNING AHEAD

Securing the Future

An old joke has it that only two things in this world are certain: death and taxes. In some important and perhaps even comforting ways, estate planning offers ACT donors a chance to have some control over both “certainties” and feel good about doing it, secure in the knowledge that they have helped ensure conservation efforts important to future generations.


A planned gift can also be an important way to maximize the financial rewards of your philanthropy. A wide range of tax and income incentives allowed by federal law are designed to promote donor generosity and might benefit you as well as ACT and the environment. Some of the most common bequest and trust arrangements are mentioned below, but would-be donors are encouraged to consult an attorney or tax and financial adviser for more information. One size does not fit all, but all estate donations benefit ACT, so thank you for considering long-term planning with conservation in mind.

Some of the options you might want to consider with your professional advisor include Wills, Bequests, Devise of

Property, Contingent Bequests and Residuary Bequests, Charitable Remainders, Life Insurance, Annuities and Retirement plans. We have some general information about these options on our website at www.AlachuaConservationTrust.org/planned-giving. By the way, you can specify that your support be used in the area of greatest need or you may apply restrictions that it be used for programs related to environmental education, land conservation (acquisition or management/restoration), outdoor recreation, or historic preservation.

If you’ve included ACT in your estate plan, please let us know. The details of your planned gift are not necessary, but we want to recognize your generosity. And please feel free to have your attorney or financial planner contact us for further details and assistance with any possible arrangements.

Done properly, estate planning can be a Win-Win-Win situation: good for you, good for charity, and good for the environment!



Thinking about leaving a planned gift for ACT but have questions concerning the process? You can contact us via email at: info@AlachuaConservationTrust.org

Photo By Kim Davidson