Everyone benefits from gifts anyone can make

Cash, appreciated stock or real estate, personal property, retirement plans, and insurance policies may be considered as funding assets for a number of gift plans.

Bequest

A bequest – a gift made through your will or living trust – can be the easiest gift to make because it costs you nothing during your lifetime. Plus, it's "revocable," so you can update or adjust it if your circumstances change. If you already have a will or living trust, you can include a bequest to IWP with a simple codicil or amendment. We can provide you with sample bequest and codicil language.

Beneficiary Designation

If you have set up a retirement plan, insurance policy, bank, and/or brokerage account, chances are you've completed a beneficiary designation form to specify who will benefit from these plans. In addition to naming individuals, you can also name charities as beneficiaries and, therefore, make a generous gift to IWP by simply updating the change of beneficiary form from your plan administrator. Like bequests, gifts by beneficiary designation are completely revocable during your lifetime and require no upfront commitment of assets. Depending on which asset you choose to give, your heirs may actually pay less tax when you leave us a gift by beneficiary designation with other assets, such as cash, stock, or real estate, passing to them.

Charitable Gift Annuity

Let us pay you for supporting IWP! With a Charitable Gift Annuity, you and IWP agree to exchange your irrevocable gift of cash or securities to us for a fixed, guaranteed, partially tax-free lifetime income to you or up to two annuitants you designate. This gift also entitles you to an immediate charitable income tax deduction and, for gifts of appreciated stock, partial avoidance of capital gains taxes. At the end of its term, the annuity balance comes to us to support our mission. No wonder the Charitable Gift Annuity is one of the most popular of all planned gifts.

Charitable Remainder Trust

Here's another gift that pays you or your designated beneficiaries for supporting IWP. Like a Charitable Gift Annuity, a Charitable Remainder Trust pays an income to you or your selected beneficiaries with the remainder transferring to IWP at the end of the trust term. This trust also provides an immediate income tax deduction and complete avoidance of all upfront capital gains taxes when an appreciated asset is transferred to the trust prior to outright sale.

Charitable Lead Trust

A Charitable Lead Trust works like a Charitable Remainder Trust in reverse. When you make the gift, the trust pays income to IWP first, typically for a term of years. When the trust term expires, any assets in the lead trust are returned to you or your family – it's really like making a loan of cash or other assets to IWP to fund any area of operations or fulfill a pledge commitment. Depending on which type of lead trust you select, you would receive either an immediate income or gift tax deduction when the trust is funded.

Want to learn more?

It's easy. Call or email. We can walk you through any of these gift opportunities in more detail. We can even prepare sample gift illustrations customized to your goals and assets (with no obligation) so you can see how a specific gift would work in your situation.

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The John Jay Legacy Society

Gifts Anyone Can Make.

You don't have to be wealthy to be generous

Have you ever wanted to make a significant gift to support our mission, but something was holding you back? Perhaps you were nervous about world events, economic projections, or the Wall Street rollercoaster.

Lots of things can seem to get in the way, even when you really want to make a difference for IWP, our students, and the nation.

Well, here's some good news for a change.

You can make a real difference and effectively demonstrate the passion and commitment you have for our mission in a tax-wise manner. Planned gifts make it possible. Your generosity can make it happen.

Benefits for Every Kind of Donor.

IWP offers a variety of gift plans that enable you to leave a meaningful legacy to secure our future while offering you and your family certain financial benefits. In many cases, instead of paying taxes for sometimes wasteful and ineffective government programs, a planned gift allows you to control how your money is spent. With planned gifts, you can:

- Make a bigger difference by not giving cash.
- Make a gift to IWP right now that costs you nothing during your lifetime.
- Reduce your income tax liability and your estate tax exposure, reduce or eliminate your capital gains taxes, and pass more of your assets to your heirs.
- Even make a gift that pays you or someone else an income stream.

Too good to be true? It's not. The advantages of planned giving for you, and for IWP, are real. That means you can demonstrate what you believe in, show your support for the traditions, principles, and values we preserve, and join us in continuing our work for generations to come.

No Hassle Giving

Your legacy to IWP doesn't have to wait somewhere over the rainbow. Leaving your mark can be as easy as adding a one-page amendment ("codicil") to your existing will, designating us as a beneficiary of your estate.

Or, perhaps, you have a paid up insurance policy hiding in the back of your desk drawer? Or a collection of antiques that has grown in value over the years? How about a piece of real estate you're sick of maintaining and would like to convert into a no-hassle income stream for you or your family?

These are just a few examples. Planned giving means more and better possibilities for making a gift to support IWP and the work we do.

Interested? In this brochure, you can learn about some of the most appealing and popular charitable gift plans. If you have any questions or require more information, please contact us.

The John Jay Legacy Society

The John Jay Legacy Society is made up of those who have made a planned gift to IWP so as to ensure that it will be a permanent institution in the nation's capital dedicated to the defense and preservation of the American Constitutional order.

The Society is named in honor of John Jay, American patriot, statesman, diplomat, lawyer, and Founding Father. Jay was the President of the Second Continental Congress, a signatory to the Treaty of Paris of 1783, the Nation's second Secretary of Foreign Affairs, and one of the authors of The Federalist Papers. He also served as U.S. Ambassador to Spain, the first Chief Justice of the Supreme Court, the second Governor of New York, and President of the American Bible Society. Less known is that Jay was the Founding Father of U.S. Counterintelligence. During the War of Independence, he headed a New York State executive body called the Committee for Detecting and Defeating Conspiracies, which is recognized as the nation's first counterintelligence agency. Jay and his Committee are credited with uncovering a plot to capture or assassinate General George Washington. His prolific work and leadership in U.S. foreign and domestic policy throughout the late 1700s is an example of unparalleled statecraft that is a model for future generations of American leaders.

Members of the Society give by: including IWP in their will; funding their estate gift with appreciated stocks, securities, bonds, or annuities; making us the beneficiary of retirement accounts or life insurance policies; or establishing a charitable remainder trust. They are united in a common goal with our students, alumni, faculty, staff, trustees, advisors, and supporters: to do their part in building a foundation for future leaders to ensure a free, secure, and prosperous America and peace with justice in the world. By helping IWP so strategically, we honor their support by including their names in our Annual Report.

Our campaign to ensure the future of IWP is an endeavor that we can only do with your help

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