



Ways of Giving

Gift options at Friends of Bonobos

Giving is the **fastest, easiest, and best** way you can help bonobos.

DONATE

Many gifts to Friends of Bonobos are made by check or credit card. If you itemize your taxes, such outright cash donations are generally deductible up to 60 percent of your adjusted gross income.

MAKE A NON-CASH GIFT

Gifts of Stock or IRA Distributions

Make a bigger impact by donating long-term appreciated securities, including stock, bonds, and mutual funds, directly to Friends of Bonobos. Compared with donating cash or selling your appreciated securities and contributing the after-tax proceeds, you may automatically increase your gift and your tax deduction.

When you donate stock or IRA distributions to a charity, you will generally take a tax deduction for the full fair market value. If you are donating stock, your contribution and tax deduction may instantly increase over 20%. Would you prefer to donate bonds or mutual funds? The same benefits apply.

The IRA Charitable Rollover allows individuals who are 70.5 years old to donate up to \$100,000 to charitable organizations directly from their IRA, without that donation being counted as taxable income when withdrawn. To qualify, contributions must come from a traditional IRA or Roth IRA, and they must be made directly to a qualified charitable organization.

This means if you donate your IRA distributions (taxed as ordinary income) your contribution and tax deduction may instantly increase by over 35%.

How do I donate?

1. Email us at help@friendsofbonobos.org for our brokerage account number and to let us know you are donating. We will let our broker know your donation is coming to ensure it ends up in the right place!

2. Tell your broker or financial advisor that you would like to make a gift of stock or IRA distribution to Friends of Bonobos at Morgan Stanley, DTC #0015. They will also need our account number (which we will have emailed to you).

Retirement Plans

You can name Friends of Bonobos as a beneficiary of part of or the entirety of your individual retirement account, Keogh plan, 401(k), 403(b) or another qualified pension plan. The funds received are exempt from probate and are not subject to federal estate tax.

Estate Gifts

One of the easiest ways to support Friends of Bonobos/Lola ya Bonobo is through your will or revocable living trust. You can name Friends of Bonobos/Lola ya Bonobo as the beneficiary of specific assets, a portion of your real estate or your residual estate after payment of other bequests. Bequests to Friends of Bonobos are exempt from federal estate tax and can provide substantial tax savings. There is no limit on the amount you can leave to Friends of Bonobos through your will.

To name Friends of Bonobos / Lola ya Bonobo in your estate, see the form included at the end of this document.





Gifts of Real Estate

Over time, real estate can become a donor's most appreciated asset and thus provide maximal benefits when sold. By donating real estate to a charity, donors can reduce or potentially eliminate capital gains tax and receive a fair market value tax deduction. The property in question can be urban, rural, developed, undeveloped, residential, or commercial, and should have appreciated in value, be marketable and easily liquidated, and ideally be debt-free.

Due to the costs of evaluating a potential gift of real estate, its minimum value must be \$20,000. You receive an income tax deduction once your property is deeded to Friends of Bonobos.

Life Income Gifts

Through a life income gift, you receive steady income and a charitable tax deduction. You may also reduce capital gains taxes. If you own stock that is paying low dividends or real estate that is not ecologically significant, a life income gift would allow you to donate the stock or real estate and receive an annual return. This income is paid to you and/or a loved one for life, after which the principal is used by Friends of Bonobos/Lola ya Bonobo.

Popular life income gifts include:

Charitable gift annuity

With a charitable gift annuity, you and Friends of Bonobos enter a lifelong contract in which you receive regular payments from your donation. Your initial donation to Friends of Bonobos/Lola ya Bonobo is set aside and invested. You then regularly receive fixed income payments for the rest of your life from the investments that are guaranteed and not subject to fluctuation. Upon your death, the remainder of the invested funds are then received by Friends of Bonobos/Lola ya Bonobo. Annuity rates are based on the ages of the income beneficiaries. The minimum gift size is \$10,000. This gifting option is reserved for beneficiaries age 50 and over.

Deferred gift annuity

A variation of the charitable gift annuity, a deferred gift annuity provides you with an income tax deduction at the time of your gift, but the income payments are deferred for at least one year.

Charitable Remainder Unitrust

A charitable remainder unitrust (CRUT) is a “split interest” separate legal entity in which you make a contribution to an irrevocable trust and may name yourself and/or another beneficiary to receive a partial tax deduction and income stream. CRUTs distribute a tax exempt, fixed percentage based on the balance of the trust assets (revalued annually), and additional contributions can be made.

After the specified timespan or upon the death of the last beneficiary, the remainder of the CRUT assets are distributed to Friends of Bonobos/Lola ya Bonobo. Unitrusts are typically used by individuals who wish to diversify their assets and works well for donations of real estate.



USE OF YOUR GIFT

Friends of Bonobos uses gifts to support the bonobo conservation work at Amis des Bonobos du Congo and bonobo awareness unless otherwise specified by the donor. If you would like your gift to be used for a particular program area, please contact us to ensure that your wishes can be met.

NEED HELP? CONTACT US!

For questions concerning gifting options at Friends of Bonobos/Lola ya Bonobo, or to let us know of a legacy gift you have planned, please call us at 919-717-9572 or email us at info@lodayabonobo.org.

Friends of Bonobos is registered in the United States as a 501(c)(3) charity. Our EIN (Federal ID) is 20-0347301. Donations are tax deductible as permitted by law.

This information is intended to provide a general overview of gift options. Friends of Bonobos cannot render tax or legal advice, and this information is not intended as such. Because of the complexity of estate planning, it is also important that you confer with a qualified advisor to assess the financial, legal, and tax benefits for your personal situation.



FRIENDS OF BONOBOS

BEQUEST PLEDGE FORM

Yes, I want to leave a legacy!

I. I am committed to leaving a lasting legacy beyond my lifetime by making a charitable bequest to Friends of Bonobos-US to be used on behalf of Les Amis des Bonobos du Congo. I have named Friends of Bonobos-US as a beneficiary of: (Check as many as apply.)

- ☐ Last Will and Testament ☐ Retirement Account
☐ Revocable Trust (Living Trust)
☐ Charitable Trust ☐ Life Insurance Policy ☐ Donor Advised Fund
☐ Other (please specify) _____

II. My provision(s) names Friends of Bonobo as:

- ☐ Primary Beneficiary ☐ Secondary Beneficiary ☐ Contingent Beneficiary

III. I estimate the total value of my gift to Friends of Bonobos-US through my estate will be \$_____. If/when this gift is received by Friends of Bonobos-US, it is my wish that the organization use my gift for the following purpose:

- ☐ Area of Greatest Need
☐ Other _____

IV. I understand that my commitment to leave a legacy gift through my estate entitles me to enrollment in the Friends of Bonobos-US Legacy Circle and special recognition during events and in print and online publications.

- ☐ Yes, I agree to acknowledgement of my gift, knowing it can inspire others to give.
☐ I wish that my charitable bequest remain anonymous.

Name (Printed)_____

Signature_____ Date_____

Address: _____ City, State, ZIP _____

Email_____ Phone_____

To facilitate our ability to honor the intentions set forth above, we would greatly appreciate a copy of your will or trust (or appropriate sections thereof) for safekeeping in our confidential files. Thank you. Friends of Bonobos understands that all bequest provisions are revocable and that any intentions stated here are not binding on you or your estate. We are deeply grateful for your vision and generosity.

Friends of Bonobos-US • P.O. Box 2652 Durham, NC 27715 • +1-919-717- 9572 •
info@lolayabonobo.org Friends of Bonobos is registered in the United States as a 501(c)(3)
charity (EIN: 20-0347301). Donations are tax deductible as permitted by law.