

The Nature
Conservancy



Protecting nature. Preserving life.®



Protecting Nature Preserving Values

Philanthropic Planning
with The Nature Conservancy

The Nature Conservancy is the leading conservation organization working around the world to **protect**
ecologically important
lands and waters

for nature and people. Thanks to our loyal supporters, we have built a tremendous record of success since our founding in 1951.

- ▶ We work with others to make people's lives better, safer and more prosperous—while still protecting the natural world for future generations.
- ▶ We have protected more than 119 million acres of land and 5,000 miles of rivers worldwide, and we have established more than 100 marine conservation projects globally.
- ▶ We work in all 50 states and more than 30 countries, protecting habitats from grasslands to coral reefs.



It's who we are and how we work that has made the Conservancy so successful — and makes us optimistic that we can expand our great conservation work to meet the challenges ahead.



- ▶ Everything we do is rooted in sound science aided by our hundreds of staff scientists.
- ▶ We pursue nonconfrontational, pragmatic solutions to conservation challenges.
- ▶ We partner with indigenous communities, businesses, governments, multilateral institutions and other nonprofits.
- ▶ We have the support of more than 1 million members who enable us to work on a scale that matters and implement solutions that endure.

PARTNERS IN PLANNING

With more than 25 years of experience, the Conservancy's gift planning program is among the most respected and successful in the nation. We manage more than \$223 million in assets and receive \$100 million annually in estate distributions. We also work with more than 20,000 individuals who have named us in their estate plans.

Your relationship with your clients is built on trust and respect. The success of the Conservancy's gift planning program is also based on a tradition of trust. We pay close attention to our supporters' conservation interests and philanthropic goals, as well as their unique financial circumstances. We urge them to consult professional advisors before they make any planned gift and strongly encourage them to consider how their gifts fit into their overall financial plan.

We welcome the opportunity to work with you and your clients to create a well-crafted estate or philanthropic plan—one that provides your clients with financial resources and tax advantages, achieves their philanthropic goals and helps to protect the natural world.



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COMPLEX ASSETS

Real Estate

The Conservancy has unparalleled expertise in real estate. We specialize in turning almost any kind of unencumbered real estate into a financially prudent gift for conservation. Property can be used to fund outright gifts, planned gifts that provide income (such as charitable remainder trusts), donor advised funds and retained life estates. Different terms and conditions apply for each type of real estate, so please contact us to discuss your clients' individual situations.

Closely Held Business Assets

Although some charitable organizations shy away from these gifts, the Conservancy has extensive experience with many types of non-cash assets, including closely- and privately-held businesses, partnerships and LLCs. We will work with you and your clients to use their most effective assets to fulfill their philanthropic goals.

STOCK AND MUTUAL FUNDS

One of the easiest ways to donate to The Nature Conservancy is through a gift of stock or mutual funds. You can simply transfer the gift electronically. The Conservancy maintains accounts at most major full-service and discount brokerage firms. Securities may also be transferred to the Conservancy's account at Merrill Lynch*:

Account #749-04834, DTC # 5198.

If your client is making a stock transfer, please contact us at (877) 812-3698 so that we can accurately record the gift and acknowledge their generosity.

**Publication of this account number does not constitute an endorsement of Merrill Lynch or its products and services.*

ESTATE PLANNING

Wills, Living Trusts and Beneficiary Designations

Legal Designation

For clients who wish to name The Nature Conservancy in their planning documents, please use the following language:

The Nature Conservancy, a nonprofit corporation, organized and existing under the laws of the District of Columbia, and with principal business address of 4245 North Fairfax Drive, Suite 100, Arlington, Virginia 22203-1606.



Everything we do
is rooted **in sound
science.**

Our tax identification number is 53-0242652.

At The Nature Conservancy, all unrestricted charitable gifts are used strategically for top conservation priorities. If your client has specific purposes in mind, please contact us at (877) 812-3698 to ensure that we can meet those wishes.

Closing the Estate

We have extensive experience in processing distributions from thousands of estates, insurance companies and plan administrators. We will work with you to facilitate distributions and meet all reporting requirements and to ensure that we are honoring your client's intentions.





Designed with advisors and their clients in mind, our website offers easy access to information you need, as well as clear illustrations of giving options:

[nature.org/advisors](https://www.nature.org/advisors)



LIFE-INCOME GIFTS

Clients who wish to make a current gift and receive a tax deduction now, but need to keep or enhance their cash flow might consider a life-income gift. The Conservancy's gift planning team can assist you and your client in determining the benefits of such a gift.

HIGH NET WORTH INDIVIDUALS

Family Philanthropic Planning Services

We help individuals establish, set goals for and administer family foundations, charitable trusts, supporting organizations and donor advised fund agreements. In addition, we work to ensure that these plans function within a family's existing financial, tax and estate planning objectives. Our goal is to create strategies that engage families as well as maximize the social and economic benefits associated with their philanthropic pursuits.

Donor Advised Fund

For clients who are considering a donor advised fund or private foundation, the Conservancy is the only conservation organization that offers its own fund. A Nature Conservancy Donor Advised Fund may be funded with cash, marketable securities, closely held stock or real estate (on a case-by-case basis). Along with distributions to Conservancy projects, recommendations may be made to any charitable organization whose mission and values are consistent with the values of The Nature Conservancy.

Visit us online at:

[nature.org/advisors](https://www.nature.org/advisors)

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The mission of
The Nature Conservancy
is to **conserve the**
lands and waters
on which all life depends.

For more information about working with
The Nature Conservancy, please contact us:

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(703) 841-8788

fax: **(703) 812-4863**

email: **legacy@tnc.org**

web: **nature.org/legacy**

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Gift Planning
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