

SUPPORTING RACIAL AND SOCIAL JUSTICE THROUGH ESTATE PLANNING



What is Your Estate Distribution Plan? How Can Support for Racial and Social Justice Play a Role?

QUESTIONS FOR YOUR CLIENT TO CONSIDER

1. What is your goal for your wealth?
2. What do you want to be remembered for?
3. What kind of legacy would you like to create for your heirs and for your community?
4. How much is enough to help launch your heirs into productive, resilient and purposeful lives?
5. Would you like a portion of your estate be dedicated to fostering public good?
6. How can support for racial and social justice play a role in your plan?



CHARITABLE GIVING OPTIONS

- Make a gift to your favorite charity in your will.
- Change the beneficiary designation in retirement plans or life insurance policies to a charity you care about.
- Designate that a percentage of your estate or estate residue will go to a charity of your choice.
- Encourage heirs to use a portion of their inheritance to make gifts to a charity of their choice.
- Make an income-generating gift like a Charitable Remainder Trust or a Charitable Lead Trust. These gifts can benefit a chosen charity, your family, and/or yourself while you are still alive.

CHARITABLE GIVING STRATEGIES

Make gifts that are flexible and unrestricted.

Unrestricted money helps an organization work smoothly, enables innovation, and provides fuel for growth. It unlocks potential and allows people to get down to business and do what they're best at.

Support charities that

- Serve communities experiencing injustice and inequity due to race and other historic causes of discrimination.
- Have leaders and staff who represent the community they are serving.
- Lift up voices and groom future leaders from Black, Indigenous, Latinx, and other Communities of Color.
- Address the root causes of economic, racial, and social injustice.

Learn from others who use a racial and social justice framework for grantmaking and investing.

- **Community Foundation of Snohomish County**
www.cf-sc.org
- **Social Justice Fund** www.socialjusticefund.org
- **Borealis Philanthropy** www.borealisphilanthropy.org
- **Giving Compass** www.givingcompass.org



Consider donating to organizations that directly address the need for systems change and community organizing through advocacy, policy development, and political and legislative action.



Don't ignore smaller, newer organizations and those that are fiscally sponsored by another 501(c)3 organization. Many are engaged in critical community-based efforts to address inequities and have important local impact.



Looking Forward. Giving Back.

Join the conversation about giving options for clients and free resources for advisors on our podcast <https://anchor.fm/lookingforwardgivingback>

Available on Spotify, Apple, and Google Podcasts.