

rails to trails conservancy

Heritage Circle

Naming RTC as an IRA or Life Insurance Beneficiary

Help ensure a bright future for America's trails by naming Rails to Trails Conservancy as a beneficiary of your Life Insurance, IRA, 401(k) or other qualified plan through this tax-efficient gift.

HOW IT WORKS

1. Contact your program administrator to request and complete a beneficiary designation form and add RTC as the beneficiary of your Life Insurance, IRA, 401(k) or other plan.
2. File copies of the completed designation form with your plan administrators and personal documents.
3. After your lifetime, the residue of your plan passes to RTC, tax free.

BENEFITS

- You can escape both income and estate tax levied on the residue left in your retirement account by leaving it to RTC.
- Give the most-taxed asset in your estate to RTC, and leave more favorably taxed property to your heirs.
- You can continue to take withdrawals during your lifetime.
- You can change the beneficiary if your circumstances change.

Beneficiary Designation Information

Rails to Trails Conservancy
2445 M Street, NW, Suite 650
Washington, DC 20037

Tax Identification Number: 52-1437006

Date of Incorporation: Nov. 22, 1985

President: Ryan Chao

Rails to Trails Conservancy is tax-exempt under section 501(c)(3) of the Internal Revenue Code and further described in section 509(a)(1) and 170(b)(1)(A)(vi).

At RTC, all unrestricted charitable gifts are used strategically to support top programmatic priorities. If you have a more specific purpose in mind, please contact us to ensure we can meet your wishes. Your support will help preserve thousands of miles of priceless trails and greenways for future generations to enjoy.

LET US KNOW YOUR PLANS

If you have included RTC as a beneficiary of your IRA or life insurance policy, please let us know! We would like to thank you for your generous commitment to the future of trails and welcome you as a member of our Heritage Circle. Contact us at **202.974.5118** or **heritage@railstotrails.org**.

We are glad to provide you and your advisor with suggestions to assist you in your planning. However, we cannot provide tax or legal advice, and we encourage all our donors to obtain their own independent and professional advice.

