

# HERITAGE LEGACY SOCIETY

*“Without a Heritage, Every Generation Starts Over.”*

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# A Clarion Call for Conservatives

By Kay C. James



**IT'S A NEW YEAR, A NEW** administration, and an alarming look at what the radical left has in store for us.

Look no further than the immediate push for a federally mandated minimum wage even as businesses are barely hanging on by a thread, an “Equality Act” that makes mainstream beliefs and science punishable by law, and an H.R. 1 “For the People Act” that violates our First Amendment rights and endangers election integrity. These are only a few clips from the left’s 2021 highlight reel, and that’s just what happened in the first quarter.

Although we could all do without these unsettling examples of how far the left is willing to go in their quest to radically alter American society, they can and should serve as an important reminder to conservatives: 2021 is not the year for patriotic Americans to stand by and watch from the sidelines. Nor is it the time to let the chips simply fall where they may, because what’s being wagered is our children’s future. Most of all, it is not the time for conservatives to cross their fingers and wish that things would sort themselves out in the future.

The policies being debated now could fundamentally alter America and make it unrecognizable to its founders. It’s a time for action, and we need your help.

Members of our Heritage Legacy Society—those members who have remembered Heritage in their estate plans—are in the fight to keep America true to its founding principles, not just today, but for generations to come. Their commitments play a pivotal role in our ability to meet the challenges America faces head-on. Legacy gifts often make the difference between resounding successes and mediocre gains. They can also be a deciding factor between ground won and ground lost.

**For more information about our Heritage Legacy Society and creating an enduring legacy for America, please return the enclosed reply form, call us toll-free at (800) 409-2003, or email us at [legacy@heritage.org](mailto:legacy@heritage.org). You may also visit our website at [heritage.giftlegacy.com](https://heritage.giftlegacy.com).**

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*We cannot afford to lose ground at this critical juncture.*

So many of the important issues Heritage is tackling right now—election integrity, censorship, illegal immigration—are being positively affected by the commitments of freedom-loving Heritage Legacy Society members who set their vision beyond their own lifetimes so that future generations can live in freedom.

There are many ways to create a legacy of freedom that will

help keep America true to its founding principles, and you can explore many of them on Heritage's new Planned Giving website, as highlighted in this newsletter. I hope you'll consider making 2021 the year that you create a meaningful legacy of freedom by becoming a member of our Heritage Legacy Society.

All the best,



## Create a Lasting Legacy for America

A provision for Heritage in your will or trust is a gift that embodies love of country and gratitude for the unique blessings of liberty we enjoy as Americans. You may make a bequest to The Heritage Foundation by including the following language in your will:

"I give, devise, and bequeath to **The Heritage Foundation,  
214 Massachusetts Avenue, N.E., Washington, D.C. 20002**

[here insert specific dollar amount; percentage of estate; percentage of the residual of your estate; or describe property]

to be used for its educational purposes."

This language can be added to an existing will very easily and at minimal expense. It is recommended that an attorney provide assistance. The Heritage Foundation's Federal Tax Identification Number is 23-7327730.

You may also consider making Heritage the beneficiary of your **IRA, insurance policy, commercial annuity**, or any other account that allows you to name a beneficiary upon death. This is a wonderful way to leave a legacy for America, and all that's typically required is your signature on a change of beneficiary form.

**If you have already included Heritage in your plans, be sure to let us know by returning the enclosed reply card so that we may thank you and extend the benefits of Heritage Legacy Society membership!**

# New Look, More Resources

**H**ERITAGE'S NEW planned giving website offers members lots of charitable giving options and direct access to our most popular downloadable planned giving tools.

## Personal Inventory eBooklet

It's important to plan for the future in a way that creates security and peace of mind for those we care about. If you're in the process of meeting with financial advisors or updating your estate plans, Heritage has developed a free "Personal Inventory eBooklet" to help capture all of your important information in once place.

Staying organized can not only maximize the time you plan to spend with advisors, but can also help you avoid burdening loved ones with the task of searching for vital information. Not clarifying something as simple as where to find a copy of your will, for example, can result in considerable loss of time, frustration, or worse—court involvement.

## eGuide to Getting Started on Your Estate Plan

Whether you're in the process of creating a will or trust for the first time or simply making

revisions that better reflect your intent, Heritage's free "eGuide to Getting Started on Your Estate Plan" will help you take those all-important first steps toward finding an advisor, knowing what questions to ask, and making sure you design a plan that's in keeping with your conservative values.

## Gift Calculators

Looking to supplement your retirement income? Thinking about incorporating charitable giving into your tax planning? Our online gift calculators allow you to estimate the payout rate and charitable deduction that you may receive from a Charitable Gift annuity or Charitable Remainder Unitrust with Heritage.

## Unique Video Resources


As part of our commitment to provide you resources geared specifically for conservatives, our new website offers access to a special three-part video series featuring nationally renowned family wealth expert Tom Rogerson.

Tom can help you effectively share your conservative values with children and grandchildren, strengthen your family's history, and help your loved ones develop





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the emotional and financial resiliency needed to weather life's challenges. He has helped some of America's most successful families create unity across multiple generations, and now Heritage is making his expertise available to you in this free video series. 

**Disclaimer:** The Heritage Foundation does not provide legal or tax advice; all material is presented solely as educational information. Examples of tax benefits are based on assumptions that might not apply to your individual circumstances. We recommend that you seek the advice of your attorney, tax advisor, and financial planner in connection with all gift and estate planning matters.

# Estate Planning Spot Check

## Procrastination

As much as we may not want to admit it, we are not immortal. When it comes to making a will or living trust, no amount of procrastination will change this fact. We may not be able to predict our future, but the security and satisfaction of a completed estate plan is very much in our control. Don't be one of the millions of Americans who pass without a will or trust, leaving government bureaucrats to decide what becomes of their life savings.

## Not Knowing What You Don't Know

It may be tempting to opt for a do-it-yourself will or living trust, but a book or software program is a poor substitute for a qualified estate planning attorney who is trained to plan for unforeseen contingencies and keep abreast of changing tax laws. Heritage's free "eGuide to Getting Started on Your Estate Plan" (see page 4) can help you take the first steps toward peace of mind.

## Failure to Communicate

Consider the example of a father of four whose children stopped his mail and closed all of his accounts after his passing. It was only after they cleared out their father's home months later that they discovered a \$1 million

life insurance policy for their benefit. That is, they found a now invalid insurance policy because they'd closed the bank account that was paying for the policy by electronic debit.

The moral of this story is to make sure your loved ones know where to find the documents they need to settle your affairs. Heritage's free "Personal Inventory eBooklet" (see page 4) can help you capture all of your important information in one place and spare your loved ones unnecessary and costly confusion. If you need some guidance on how to improve family communication on matters such as these, be sure to visit our planned giving website for our three-part video series featuring family wealth expert Tom Rogerson (see page 4 for more information).

## Update, and Then Update Again

Don't let thoughtful planning go to waste by allowing your existing will to become obsolete. Changing laws—as well as changes in the value of your estate—may significantly affect your plans. Changes prompted by birth, death, divorce, health, or even a shift in charitable priorities may require updates to your plan. 