HERITAGE
LEGACY SOCIETY

“Without a Heritage, Every Generation Starts Over.”

PAGE 4
Marvin Koepel: A Legacy of Freedom

PAGE 7
Protecting Your Legacy

PAGE 10
New Heritage Legacy Society Members
A

SAMERICANS, WE ARE the fortunate heirs of patriots who, during difficult times throughout our history, selflessly risked their own well-being or comfort for the sake of future generations. We rightly celebrate the few whose stories have been passed down for posterity, but for every one whose name we know, there are hundreds more whose quiet sacrifices have impacted our lives in important ways.

At Heritage, we know many of these Americans and are proud to call them our members. The members of one group in particular, our Heritage Legacy Society, have gone above and beyond by remembering Heritage in their wills, trusts, and other beneficiary designations. Members like Marvin Koep, who we sadly lost this year, still impact America in an inspiring and substantive way. You can read more about Marvin on page 4 of this newsletter.

Not everyone considers America’s future when it comes to their charitable giving or planning their estates. America certainly would be better off if they did. That’s what makes our Heritage Legacy Society so extraordinarily important, and the patriotic individuals behind these gifts are having a vital impact on our country’s future. The newsletter before you is an opportunity for us to share stories about great Americans like Marvin and provide you the tools you need to create your own, lasting legacy for America.

Sincerely yours,

Kevin Roberts

For more information about remembering The Heritage Foundation in your plans, please email us at legacy@heritage.org, call us toll-free at (800) 409-2003, or visit our planned giving website at heritage.giftlegacy.com.
ONE OF OUR GREAT privileges here at Heritage is the opportunity to meet so many extraordinary individuals dedicated to preserving all that’s special about America. One of these special people was Heritage Legacy Society member Marvin Koeper of Rhodes, Iowa, who we sadly lost this year at age 96. We mourn his loss greatly, but it would be difficult to think of Marvin without recalling his exemplary love of country. In every possible way, his life and legacy are cause for celebration.

Marvin was born and raised on an Iowa farm that had been worked by his family for more than 100 years, including the especially trying years of the Great Depression. True grit and determination were underlying themes in his parents’ lives, qualities that were never lost on Marvin. In his own words, “They were giants in my eyes, and my image of them grows taller every day.”

As Marvin recalled in an interview with Heritage several years ago, as a teenager, the lure of a world beyond his small town took hold of him, and his parents encouraged him to pursue something easier than the physical demands of farming. He excelled as a student at Iowa State University, was drafted during the Korean War, and finished a Master’s Degree in Agriculture on the G.I. Bill.

At this point in his life, Marvin could have easily pursued a life in academia or cashed in on more commercial agricultural ventures. Instead, he returned to his family farm.

As Marvin recounted to us, he realized the best agricultural education he could ever hope to receive had been under his nose the entire time. “I took a long hard look at what my parents had built and realized that they understood more about real-life economics and engineering than any professor possibly could. It was time for me to wake up to the real world—the world my parents had succeeded in thanks to ingenuity and good old fashioned hard work.”

The real world also included things like local politics and influential entities like the Iowa Farm Bureau, which at the time, was often subject to corruption and greed. Marvin spent most of his adult life advocating for
“Marvin had an extraordinary impact on our ability to amplify the voices of American workers and business owners. With his generous gift, we were able to launch the Save Our Paychecks national tour, our grassroots campaign opposing Biden’s tax and spend plan. His impact will continue to make a difference in the months ahead as we gear up for the midterm elections.”

Jessica Anderson
Executive Director
Heritage Action for America

Marvin’s commitment to freedom was such that less than a year before his passing, he reached out to Heritage wanting to know what more he could do help America. As someone deeply aware of how important locally targeted grassroots efforts are in combating bad policies, he made the extraordinary decision to make a generous, seven-figure gift to Heritage’s sister advocacy group, Heritage Action for America. Marvin was able to not only relish in the commitments he had made toward America’s future, but thanks to this generous outright gift to Heritage Action, he was able to enjoy seeing the impact of his giving during his lifetime as well. For this, we are truly grateful, and Heritage looks forward to carrying Marvin Koeper’s legacy for America into the future for generations to come.

sound agricultural reform, which brought him even closer to Heritage’s work. In his words, “Everything Heritage does is driven by our founding principles, and many years of fighting bad agricultural policy has also taught me that success doesn’t happen overnight. It can take years or even decades to see movement. I know Heritage is in it for the long haul.”

Marvin created an indelible legacy at Heritage not only through his friendship but also by establishing far-reaching gifts for Heritage, such as charitable gift annuities and a provision in his will. As he once told us, “Money isn’t worth anything unless it’s used for a positive cause. America is facing a battle it can’t afford to lose, and we’d better make sure we get it right. It’s important for me to know I did all I could during this critical time in our history.”
Protecting Your Legacy

Americans who choose to include charitable gifts in their estate are the backbone of our society. History has proven time and again that private citizens doing good things with conviction will always outshine an overgrown, politically motivated, and wasteful government.

Unlike our day-to-day charitable donations, however, a gift from your estate is a gift for the future and will benefit from additional, forward-looking thinking:

**Is there a proven track record?**
With hundreds of thousands of charities to choose from, each with their own compelling appeals for support, it’s sometimes difficult to separate words from action. Those contemplating a bequest to charity should ask the question: Does the charity have a history of financial stability, capable leadership, and consistent growth? According to the National Center for Charitable Statistics, roughly a third of nonprofits fail to exist after 10 years. When leaving a future legacy, it’s important to know your gift will not be in jeopardy.

**Identifying deep versus shallow roots**
Many charitable organizations are born of someone’s bright idea about how to meet an area of need in our society. Unfortunately, that’s where some charities stay—the idea phase. Is too much of a charity’s success dependent on one particular leader, or is there a broader foundation of strong executive leadership and active board governance? Does it have a long term strategic plan, and is there transparency regarding its details? A bequest is a far reaching investment, and you deserve to have a high degree of confidence that your charity’s operations are more than skin deep.

**Mission drift**
For conservatives in particular, protecting against a pervasive shift toward leftist ideology is paramount when remembering an organization in your estate. Does the charity’s messaging reflect a shift toward “political correctness?” Does it receive funding from individuals or entities who might compromise its mission? What built-in safeguards does it have in place to protect against the widespread shift toward leftist governance we’ve seen in corporations, private foundations, and universities? In the absence of intentional policies and firewalls, organizations leave themselves dangerously vulnerable, which means your legacy could be in danger of supporting work at odds with your beliefs.
None of us can predict the future, but when it comes to your estate, there’s a lot you can do to ensure your game plan is carried out successfully.

**Draft a winning team**
Choosing a qualified estate planning attorney to draft your estate documents is an essential step in ensuring a solid plan, and identifying a responsible personal representative to carry out your plan will help ensure a winning combination. When choosing who will ultimately carry out your plans, it’s wise to keep their age in mind. Choosing a representative who is similar in age to you could be problematic down the road. Similarly, if you’ll be relying on a law practice or other third party fiduciary to carry out your final estate, consider choosing a practice with a deep bench so that there will always be someone available to put your plan into effect even if the attorney who drafted your plans has long since retired.

**Share your playbook with key players**
Even the most expertly drafted estate plan will be of little use if it can’t be located when needed. In addition to putting your estate at risk, confusion can be difficult on loved ones. Make sure those who’ve been entrusted to carry out your plans know how to locate the most recent copy of your will, can identify active accounts or outstanding debts, and know how to locate important documents such as deeds or titles of ownership. To help toward that end, Heritage has created a free, downloadable “Personal Inventory” that can be used to gather all of your important information in one place.

**Avoid unforced errors**
Once you have an estate plan in place, it’s important to have it reviewed periodically. All of the changes that families typically experience over time—births, deaths, marriage, divorce, changes in finances, special
health considerations—can impact your estate plan. Even in the absence of these types of events, tax laws are subject to change, and state and federal inheritance laws may have changed since the last revision to your will or trust.

**Play defense with your intent**
A well-crafted estate plan is the first line of defense in protecting your intent, but sometimes unforeseen challenges can test the best of plans. Even here at Heritage, we’ve seen our fair share of contested estates and unexpected scenarios. Being clear about your wishes now, during your lifetime, can go a long way toward supporting your goals. If there are individuals or situations that could present a problem in the future, be candid with your estate planning attorney so that special language or safeguards can be put into place. In the case of provisions for charitable organizations, consider making your intentions known to those charities. The more people who understand your vision for the future, the more powerful your legacy will be.

---

**Create a Lasting Legacy for America**

The sample language below may be used to make a bequest to The Heritage Foundation 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.

The Heritage Foundation’s Federal Tax Identification Number is 23-7327730. It is recommended that a qualified estate planning attorney provide assistance.

You may also consider making Heritage the beneficiary of your **IRA, insurance policy, commercial annuity**, or any other account which allows for a beneficiary upon death.

---

*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.*
Thank You.

The Heritage Foundation thanks the newest members of the Heritage Legacy Society, listed below, for their leadership in creating a better America and leaving a legacy of freedom for future generations. Their commitment through their estate or other planned gift ensures that there will always be a strong voice for conservative principles in the nation’s capital.

New Heritage Legacy Society Members

Mr. Jozephus J. Aarts  
Mr. Nicholas P. Alban  
Mr. John E. Alley  
Mr. and Mrs. Philip Allor  
Mr. Alfred Alvarez  
Mr. Jerome S. Amber  
Mr. Morris Armstrong  
Mr. and Mrs. John J. Atherton  
Ms. Sue Augenstien  
Mr. Dan Baerthel  
Miss Catherine Baker  
Ms. Joyce Ballard  
Mr. Bruce Barner  
Dr. William Benson  
Mr. and Mrs. Frederick L. Berta  
Mr. James L. Bertram  
Mr. Ron Bildstein  
Mr. and Mrs. Steve Bjorkman  
Mr. Ronald Blaauboer  
Mr. Scott Alan Blanchard  
Mr. T. E. Blanchard  
Mr. David Blazensky  
Mr. Phillip R. Boyce  
Mr. Dennis L. Briggs  
Mr. John L. Brouillette  
Miss Nadine M. Brown  
Dr. Eugene Bruder  
Ms. Loralee Burnett  
Mr. Steven Buyers  
Mr. Randy Calk  
Mr. David T. Caputo  
Mr. and Mrs. Louis Cardon  
Mr. and Mrs. Stanley Carlson  
Mr. Richard Carr  
Mr. and Mrs. Dennis L. Carter  
Mrs. Kathie Casey  
Ms. Christine Certo  
Mr. Ku Chin  
Mr. Steve Christophersen  
Mr. and Mrs. William F. Clarke  
Mr. Truman R. Coble Jr.  
Ms. Lynn M. Cochran  
Mrs. Eleanor C. Colburn  
Ms. Arlyne Cornelsen  
Mr. Lawrence M. Costa  
Mr. Mark Cunningham  
Mr. and Mrs. Anthony J. Czerwinski  
Mr. Michael J. Dahms  
Mr. Ron Daley  
Mr. Gary Davis  
Mr. Donald D. Dennis, Sr.  
Mr. Richard Deters  
Mr. Prayong Dhammasiri  
Mrs. Joan Dinse  
Mrs. and Mr. Laurel Dumont  
Mr. David Ellis  
Mr. and Mrs. Steven Ercole  
Mr. William C. Erwin Jr.  
Mr. Natividad Escobedo  
Mr. Gordon Evans  
Mr. Joseph Falanga  
Ms. Suzan Fender  
Mr. Jeff Fischer  
Ms. Lauranne Fisher  
Ms. Victoria I. Ford  
Mr. Clyde Kingdom French  
Dr. Robert H. Friedman  
Mr. William G. Frye  
Mr. Paul E. Fulbright  
Mr. J. L. Fuller  
Mr. Thomas E. Futcher  
Mr. Lyle W. Gansko  
Mr. Dennis Garlock  
Mr. Peter D. Gianino  
Mr. Joe Gillen  
Ms. Patricia Gilroy  
Mr. Wally Glasgow  
Mr. Howard D. Goldstein  
Ms. Bonita J. Gorbaty  
Mr. Dennis Greenia  
Mr. and Mrs. Hal K. Grimshaw  
Ms. Andrea Grossman  
Mr. Kieu Ha  
Mr. Jon W. Hachfeld  
Mrs. Elyse Hall  
Mr. Dean Hampton  
Mr. John B. Haney  
Mr. Gerald H. Hardey  
Mr. Joseph Hardy  
Mr. Glenn Harney  
Mr. Guy Harriman  
Mr. Tyrell W. Haynes  
Mr. and Mrs. Thomas Hazelton  
Mr. Roger Heins  
Mr. William Hembree  
Ms. Carrie Henderson  
Ms. Marjorie R. Hess  
Mr. Gregory Hesse  
Mr. and Mrs. Kenneth O. Heusser  
Mr. John Hirschberger  
Mrs. Bonnie Hocker  
Mrs. Pat Hoffmeier  
Mr. Ronald Hohl  
Mr. David B. Holland  
Ms. Darlyne Horn  
Harley and Jean E. Hunter  
Mr. Edgar Huntington
Mr. Steven F. Hurst
Ms. Carlos Jaureguizar
Ms. Camille Jeanbaptiste
Ms. Anne Jenkins
Mr. Hubert Johnson
Mr. Jacob K. Johnson
Mr. and Ms. Kenneth W. Johnson
Dr. and Mrs. Stewart Johnson
Mr. Ron Kauffman
Mrs. Marlene A. Kautz
Mr. Lewis Kayes
Mr. David Kelly
Mr. Rodney A. Klein
Mr. William Klein
Mr. Andrew Kluger
Mr. Larry Knoebel
Mr. Robert D. Kopisch
Mr. Bert Krages
Mr. Michael Kuehn
Ms. Patricia Labranche
Mr. Larry Ladd
Ms. Karen Lampert
Mr. Robert P. Lewis
Mr. Emory Liggett
Dr. Cornelius A. Link
Mr. and Mrs. Patrick O. Little
Mr. Hugh Littrell
Mr. Stewart W. Long
Ms. Anita Lopes
Mr. Jose Lora
Mr. Harold Lowry
Mr. Robert L. Lowry
Mr. and Mrs. William E. Lutz
Mr. Mark Macconnell
Mr. John F. Malin Sr.
Ms. Helen Maret
Ms. Suzanne M. Maridon-Crites
Mrs. Lucille Marshall
Mr. William H. Marshall Jr.
Mr. and Mrs. Ken Marts
Mr. and Mrs. Ray Masayko
Mr. Terrence E. McCracken
Ms. Rebecca McNamara
Mr. David G. Meadows
Mr. Richard Melcher
Mrs. and Mrs. Laurence D. Mendenhall
Mr. Robert W. Mercer
Mr. Dave Messinger
Mr. Doug Metten
Mr. Albert D. Meyer
Mr. and Mrs. John H. Meyer
Mr. Ben Milier
Mrs. Joanne Miller
Mr. Gregory Mitchell
Mr. Victor Mitchell
Mr. Stephen C. Mohler
Mr. Baxter Moore
Ms. Carolyn S. Mueller
Mr. Jess A. Muniz
Mr. Nicolas Nelson
Mr. Paul L. New
Mr. Dennis Nicolette
Mr. Mike A. Nielsen
Mr. Robert Nisley
Mr. and Mrs. Tom Nixon
Mr. Vernon R. Nygren
Mr. Dan J. O’Brien
Dr. and Mrs. Robert O’Bryan
Mr. Tom O’Connor
Mr. James J. Oliver
Mr. Herb Overstreet
Mr. Bruce Owens
Mr. Claudio Padres
Mr. John M. Paroubek
Mrs. Janet A. Parrott
Mr. Kenneth W. Payauys
Ms. Barbara Peck
Mr. and Mrs. Gary L. Perry
Mr. Philip F. Peterson Jr.
Mr. Keith I. Pfeifle
Mr. Ronald C. Phillips
Mr. Rafael Pondoč
Mr. Nicholas Ponzio
Mrs. Carol L. Pride
Ms. Susan T. Priest
Mr. and Mrs. Alan Z. Priven
Mrs. Carol Radkis
Mrs. Mildred Rea
Mr. Jeffrey A. Reise
Mr. Wayne Rentfro
Mr. Jerry Rij
Mr. Richard A. Ringo
Mr. James A. Riviello
Mrs. Shirley W. Roe
Mr. Richard J. Rolwing
Mr. Duane Ross
Mr. and Mrs. Paul R. Rowe
Mr. Leonard Russo
Ms. Sylvia Sabatino
Mrs. Gismon Safdeye
Mr. Dudley B. Samford Jr.
Mr. Ronald L. Saper
Mrs. Bonnie A. Sato
Mr. Richard B. Satterthwaite
Mr. Dennis Schaefer
Mr. and Mrs. William Schertz
Ms. Theresa A. Schill
Mrs. Cora Lee Schingnitz
Mr. Thomas Schmoll
Mr. and Mrs. Val Schnabl
Mr. Edward S. Scott
Mr. Raymond C. Seegers
Mr. Earl A. Shepard
Mr. Ron Sherman
Mrs. Barbara Sinks
Mr. William Sirrine
Mr. Ky Y. Siu
Mr. Ted Slater
Mr. Gerald Slot
Ms. Christine Smith
Mrs. Janet L. Smith
Mr. Arkady P. Spakovsky
Ms. Patti Stanton
Mr. David Steinhauser
Mr. John T. Sturdy
Ms. Janice Sullivan
Mr. Patrick Switzer
Ms. Diane Taylor
Mr. and Mrs. Roger Tompkins
Mrs. Theresa Toscanini
Mr. Richard Trudell
Mr. Franklin W. Turner
Mr. and Mrs. Harold E. Wake
Mr. Brian T. Walsh
Mr. and Mrs. Howard N. Watrous
Mr. John Weigle
Ms. Kathryn Wentz
Ms. Catherine Widmaier
Mrs. Kristina K. Wightman
Ms. Brenda Wilson
Mr. D. Bruce Wilson
Mr. James L. Woods
Ms. Nancy K. Wyatt
Mr. Joshua Youngkin
Ms. Lois R. Zimmerman
Mr. Steven F. Hurst
Ms. Carlos Jaureguizar
Ms. Camille Jeanbaptiste
Ms. Anne Jenkins
Mr. Hubert Johnson
Mr. Jacob K. Johnson
Mr. and Ms. Kenneth W. Johnson
Dr. and Mrs. Stewart Johnson
Mr. Ron Kauffman
Mrs. Marlene A. Kautz
Mr. Lewis Kayes
Mr. David Kelly
Mr. Rodney A. Klein
Mr. William Klein
Mr. Andrew Kluger
Mr. Larry Knoebel
Mr. Robert D. Kopisch
Mr. Bert Krages
Mr. Michael Kuehn
Ms. Patricia Labranche
Mr. Larry Ladd
Ms. Karen Lampert
Mr. Robert P. Lewis
Mr. Emory Liggert
Dr. Cornelius A. Link
Mr. and Mrs. Patrick O. Little
Mr. Hugh Littrell
Mr. Stewart W. Long
Ms. Anita Lopes
Mr. Jose Lora
Mr. Harold Lowry
Mr. Robert L. Lowry
Mr. and Mrs. William E. Lutz
Mr. Mark Macconnell
Mr. John F. Malin Sr.
Ms. Helen Maret
Ms. Suzanne M. Maridon-Crites
Mrs. Lucille Marshall
Mr. William H. Marshall Jr.
Mr. and Mrs. Ken Marts
Mr. and Mrs. Ray Masayko
Mr. Terrence E. McCracken
Ms. Rebecca McNamara
Mr. David G. Meadows
Mr. Richard Melcher
Mrs. and Mrs. Laurence D. Mendenhall
Mr. Robert W. Mercer
Mr. Dave Messinger
Mr. Doug Metten
Mr. Albert D. Meyer
Mr. and Mrs. John H. Meyer
Mr. Ben Miler
Mrs. Joanne Miller
Mr. Gregory Mitchell
Mr. Victor Mitchell
Mr. Stephen C. Mohler
Mr. Baxter Moore
Ms. Carolyn S. Mueller
Mr. Jess A. Muniz
Mr. Nicolas Nelson
Mr. Paul L. New
Mr. Dennis Nicolette
Mr. Mike A. Nielsen
Mr. Robert Nisley
Mr. and Mrs. Tom Nixon
Mr. Vernon R. Nygren
Mr. Dan J. O’Brien
Dr. and Mrs. Robert O’Bryan
Mr. Tom O’Connor
Mr. James J. Oliver
Mr. Herb Overstreet
Mr. Bruce Owens
Mr. Claudio Padres
Mr. John M. Paroubek
Mrs. Janet A. Parrott
Mr. Kenneth W. Payauys
Ms. Barbara Peck
Mr. and Mrs. Gary L. Perry
Mr. Philip F. Peterson Jr.
Mr. Keith I. Pfeifle
Mr. Ronald C. Phillips
Mr. Rafael Pondoc
Mr. Nicholas Ponzo
Mrs. Carol L. Pride
Ms. Susan T. Priest
Mr. and Mrs. Alan Z. Priven
Mrs. Carol Radkins
Mrs. Mildred Rea
Mr. Jeffrey A. Reise
Mr. Wayne Rentfro
Mr. Jerry Rij
Mr. Richard A. Ringo
Mr. James A. Riviello
Mrs. Shirley W. Roe
Mr. Richard J. Rolwing
Mr. Duane Ross
Mr. and Mrs. Paul R. Rowe
Mr. Leonard Russo
Ms. Sylvia Sabatino
Mrs. Gilsom Safdeye
Mr. Dudley B. Samford Jr.
Mr. Ronald L. Saper
Mrs. Bonnie A. Sato
Mr. Richard B. Satterthwaite
Mr. Dennis Schaefer
Mr. and Mrs. William Schertz
Ms. Theresa A. Schill
Mrs. Cora Lee Schingnitz
Mr. Thomas Schmoll
Mr. and Mrs. Val Schnabl
Mr. Edward S. Scott
Mr. Raymond C. Seegers
Mr. Earl A. Shepard
Mr. Ron Sherman
Mrs. Barbara Sinks
Mr. William Sirrine
Mr. Ky Y. Siu
Mr. Ted Slater
Mr. Gerald Slot
Ms. Christine Smith
Mrs. Janet L. Smith
Mr. Arkady P. Spakovsky
Ms. Patti Stanton
Mr. David Steinhauser
Mr. John T. Sturdy
Ms. Janice Sullivan
Mr. Patrick Switzer
Ms. Diane Taylor
Mr. and Mrs. Roger Tompkins
Mrs. Theresa Toscanini
Mr. Richard Trudell
Mr. Franklin W. Turner
Mr. and Mrs. Harold E. Wake
Mr. Brian T. Walsh
Mr. and Mrs. Howard N. Watrous
Mr. John Weigle
Ms. Kathryn Wentz
Ms. Catherine Widmaier
Mrs. Kristina K. Wightman
Ms. Brenda Wilson
Mr. D. Bruce Wilson
Mr. James L. Woods
Ms. Nancy K. Wyatt
Mr. Joshua Youngkin
Ms. Lois R. Zimmerman