

HERITAGE LEGACY SOCIETY

“Without a Heritage, Every Generation Starts Over.”

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Choosing America

By Kevin Roberts

AS AMERICANS, 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.

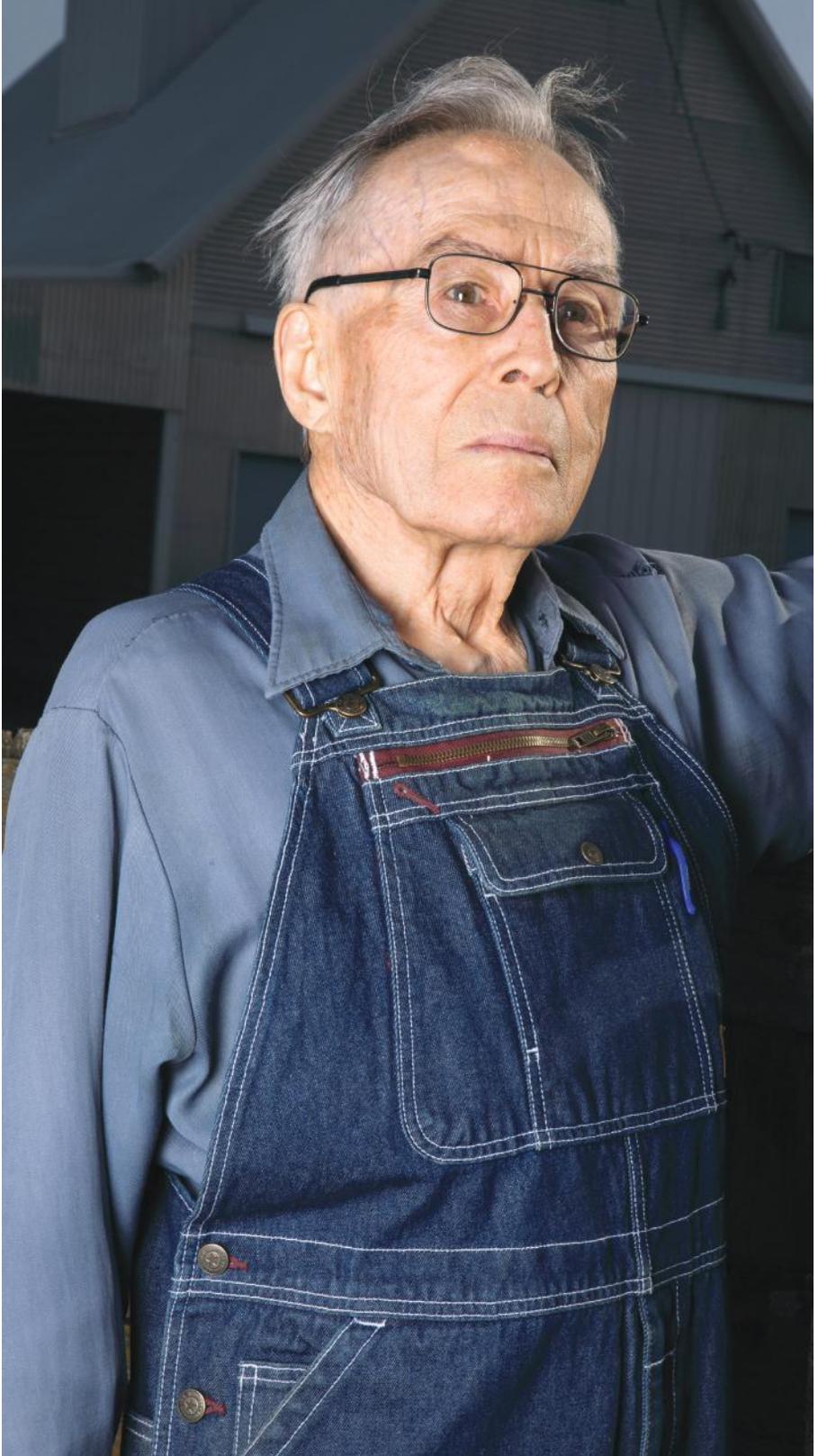
At Heritage, we know many of these Americans and are proud to call them our members. The members of one group in particular, our Heritage Legacy Society, have gone above and beyond by remembering Heritage in their wills, trusts, and other beneficiary designations. Members like Marvin Koeper, who we sadly 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,

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.



PAUL AND TAMMY BUNKOFKSE

Marvin Koeper: A Legacy of Freedom

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



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.”

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. 🙏

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. 🏠



GETTY IMAGES

Your Legacy for the Win

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. 📌

FEATURED

To download your free copy of our Personal Inventory, visit the "Resources" section of our website at heritage.giftlegacy.com.

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	Ms. Christine Certo	Mr. Lyle W. Gansko
Mr. Nicholas P. Alban	Mr. Ku Chin	Mr. Dennis Garlock
Mr. John E. Alley	Mr. Steve Christophersen	Mr. Peter D. Gianino
Mr. and Mrs. Philip Allor	Mr. and Mrs. William F. Clarke	Mr. Joe Gillen
Mr. Alfred Alvarez	Mr. Truman R. Coble Jr.	Ms. Patricia Gilroy
Mr. Jerome S. Amber	Ms. Lynn M. Cochran	Mr. Wally Glasgow
Mr. Morris Armstrong	Mrs. Eleanor C. Colburn	Mr. Howard D. Goldstein
Mr. and Mrs. John J. Atherton	Ms. Arlyne Cornelsen	Ms. Bonita J. Gorbaty
Ms. Sue Augenstein	Mr. Lawrence M. Costa	Mr. Dennis Greenia
Mr. Dan Baerthel	Mr. Mark Cunningham	Mr. and Mrs. Hal K. Grimshaw
Miss Catherine Baker	Mr. and Mrs. Anthony J. Czerwinski	Ms. Andrea Grossman
Ms. Joyce Ballard	Mr. Michael J. Dahms	Mr. Kieu Ha
Mr. Bruce Barner	Mr. Ron Daley	Mr. Jon W. Hachfeld
Dr. William Benson	Mr. Gary Davis	Mrs. Elyse Hall
Mr. and Mrs. Frederick L. Berta	Mr. Donald D. Dennis, Sr.	Mr. Dean Hampton
Mr. James L. Bertram	Mr. Richard Deters	Mr. John B. Haney
Mr. Ron Bildstein	Mr. Prayong Dhammasiri	Mr. Gerald H. Hardesty
Mr. and Mrs. Steve Bjorkman	Mrs. Joan Dinse	Mr. Joseph Hardy
Mr. Ronald Blaauboer	Mrs. and Mr. Laurel Dumont	Mr. Glenn Harney
Mr. Scott Alan Blanchard	Mr. David Ellis	Mr. Guy Harriman
Mr. T. E. Blanchard	Mr. and Mrs. Steven Ercole	Mr. Tyrell W. Haynes
Mr. David Blazensky	Mr. William C. Erwin Jr.	Mr. and Mrs. Thomas Hazelton
Mr. Phillip R. Boyce	Mr. Natividad Escobedo	Mr. Roger Heins
Mr. Dennis L. Briggs	Mr. Gordon Evans	Mr. William Hembree
Mr. John L. Brouillette	Mr. Joseph Falanga	Ms. Carrie Henderson
Miss Nadine M. Brown	Ms. Suzan Fender	Ms. Marjorie R. Hess
Dr. Eugene Bruder	Mr. Jeff Fischer	Mr. Gregory Hesse
Ms. Loralee Burnett	Ms. Lauranne Fisher	Mr. and Mrs. Kenneth O. Heusser
Mr. Steven Buyers	Ms. Victoria I. Ford	Mr. John Hirschberger
Mr. Randy Calk	Mr. Clyde Kingdon French	Mrs. Bonnie Hocker
Mr. David T. Caputo	Dr. Robert H. Friedman	Mrs. Pat Hoffmeier
Mr. and Mrs. Louis Cardon	Mr. William G. Frye	Mr. Ronald Holl
Mr. and Mrs. Stanley Carlson	Mr. Paul E. Fulbright	Mr. David B. Holland
Mr. Richard Carr	Mr. J. L. Fuller	Ms. Darlynn Horn
Mr. and Mrs. Dennis L. Carter	Mr. Thomas E. Futcher	Harley and Jean E. Hunter
Mrs. Kathie Casey		Mr. Edgar Huntington

Mr. Steven F. Hurst	Mr. Doug Metten	Mr. Leonard Russo
Ms. Carlos Jaureguizar	Mr. Albert D. Meyer	Ms. Sylvia Sabatino
Ms. Camille Jeanbaptiste	Mr. and Mrs. John H. Meyer	Mrs. Gilsom Safdeye
Ms. Anne Jenkins	Mr. Ben Miler	Mr. Dudley B. Samford Jr.
Mr. Hubert Johnson	Mrs. Joanne Miller	Mr. Ronald L. Saper
Mr. Jacob K. Johnson	Mr. Gregory Mitchell	Mrs. Bonnie A. Sato
Mr. and Ms. Kenneth W. Johnson	Mr. Victor Mitchell	Mr. Richard B. Satterthwaite
Dr. and Mrs. Stewart Johnson	Mr. Stephen C. Mohler	Mr. Dennis Schaefer
Mr. Ron Kauffman	Mr. Baxter Moore	Mr. and Mrs. William Schertz
Mrs. Marlene A. Kautz	Ms. Carolyn S. Mueller	Ms. Theresa A. Schill
Mr. Lewis Kayes	Mr. Jess A. Muniz	Mrs. Cora Lee Schingnitz
Mr. David Kelly	Mr. Nicolas Nelson	Mr. Thomas Schmoll
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Mr. William Klein	Mr. Dennis Nicolette	Mr. Edward S. Scott
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Mr. Larry Knoebel	Mr. Robert Nisley	Mr. Earl A. Shepard
Mr. Robert D. Kopisch	Mr. and Mrs. Tom Nixon	Mr. Ron Sherman
Mr. Bert Krages	Mr. Vernon R. Nygren	Mrs. Barbara Sinks
Mr. Michael Kuehn	Mr. Dan J. O'Brien	Mr. William Sirrine
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Mr. Larry Ladd	Mr. Tom O'Connor	Mr. Ted Slater
Ms. Karen Lampert	Mr. James J. Oliver	Mr. Gerald Slot
Mr. Robert P. Lewis	Mr. Herb Overstreet	Ms. Christine Smith
Mr. Emory Liggett	Mr. Bruce Owens	Mrs. Janet L. Smith
Dr. Cornelius A. Link	Mr. Claudio Padres	Mr. Arkady P. Spakovsky
Mr. and Mrs. Patrick O. Little	Mr. John M. Paroubek	Ms. Patti Stanton
Mr. Hugh Littrell	Mrs. Janet A. Parrott	Mr. David Steinhauer
Mr. Stewart W. Long	Mr. Kenneth W. Payauys	Mr. John T. Sturdy
Ms. Anita Lopes	Ms. Barbara Peck	Ms. Janice Sullivan
Mr. Jose Lora	Mr. and Mrs. Gary L. Perry	Mr. Patrick Switzer
Mr. Harold Lowry	Mr. Philip F. Peterson Jr.	Ms. Diane Taylor
Mr. Robert L. Lowry	Mr. Keith I. Pfeifle	Mr. and Mrs. Roger Tompkins
Mr. and Mrs. William E. Lutz	Mr. Ronald C. Phillips	Mrs. Theresa Toscanini
Mr. Mark Macconnell	Mr. Rafael Pondoc	Mr. Richard Trudell
Mr. John F. Malin Sr.	Mr. Nicholas Ponzio	Mr. Franklin W. Turner
Ms. Helen Maret	Mrs. Carol L. Pride	Mr. and Mrs. Harold E. Wake
Ms. Suzanne M. Maridon-Crites	Ms. Susan T. Priest	Mr. Brian T. Walsh
Mrs. Lucille Marshall	Mr. and Mrs. Alan Z. Priven	Mr. and Mrs. Howard N. Watrous
Mr. William H. Marshall Jr.	Mrs. Carol Radkins	Mr. John Weigle
Mr. and Mrs. Ken Marts	Mrs. Mildred Rea	Ms. Kathryn Wentz
Mr. and Mrs. Ray Masayko	Mr. Jeffrey A. Reise	Ms. Catherine Widmaier
Mr. Terrence E. McCracken	Mr. Wayne Rentfro	Mrs. Kristina K. Wightman
Ms. Rebecca McNamara	Mr. Jerry Rij	Ms. Brenda Wilson
Mr. David G. Meadows	Mr. Richard A. Ringo	Mr. D. Bruce Wilson
Mr. Richard Melcher	Mr. James A. Riviello	Mr. James L. Woods
Mrs. and Mrs. Laurence D. Mendenhall	Mrs. Shirley W. Roe	Ms. Nancy K. Wyatt
Mr. Robert W. Mercer	Mr. Richard J. Rolwing	Mr. Joshua Youngkin
Mr. Dave Messinger	Mr. Duane Ross	Ms. Lois R. Zimmerman
	Mr. and Mrs. Paul R. Rowe	

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