



Planned Giving Program

The information in this booklet will help guide you in a decision to create a legacy gift for the National Motorists Association (NMA) and/or the non-profit NMA Foundation, providing resources to help the NMA organizations protect drivers' rights for generations to come.

Please contact the NMA by telephone at 608-849-6000 or by email at NMA@motorists.org with any questions about the information presented here, or any aspect of the Planned Giving Program.

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Details are provided on how to become a member of this exclusive group of the NMA organizations' most significant contributors.

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Three types of bequests - outright, conditional, and restricted - are explained. Suggested language for a range of bequest clauses is provided.

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In order to provide a legacy gift to an advocacy organization, a philanthropist will want to know that the current goals of the organization will be carried into the future. This section presents some of the key motorists' issues that the NMA has been tackling for decades and will continue to fight for as long as there are individual drivers navigating our nation's highways.

Confidential Bequest Form

Return this form to the NMA to share your intention to include the NMA and/or NMA Foundation in your estate plans. The information is helpful for our future resource planning. It also allows us to recognize your generosity at the time you make your non-binding pledge.



Planned Giving Program



Section 1

The NMA Visionary Club

An exclusive membership consisting of significant contributors to the National Motorists Association and the non-profit NMA Foundation.

The NMA established the Visionary Club to formally recognize the valuable role of contributors to the cause of motorists' rights through donations to the NMA and/or NMA Foundation. Members of the NMA Visionary Club have donated \$2,500 or more cumulatively over the years, either by direct contributions of cash, other assets, or by bequest of a future gift.

Membership levels within the Visionary Club are evaluated annually. New members to the Club, or those who have reached higher giving levels, will be recognized with a certificate of membership memorializing their level of philanthropy and support for motorists' rights.

The member levels of the Visionary Club are:

<u>Level of Cumulative Giving</u>		<u>Member Level</u>
\$ 2,500	to \$ 9,999	Benefactor
\$ 10,000	to \$ 24,999	Benefactor Cum Laude
\$ 25,000	to \$ 49,999	Benefactor Magna Cum Laude
\$ 50,000	to \$ 99,999	Benefactor Summa Cum Laude
\$ 100,000	or greater	James J. Baxter Founders Circle

A list of Visionary Club members, by giving level, is published annually in the NMA Foundation magazine for NMA members, *Driving Freedoms*. Those Visionary Club members who wish to remain anonymous have their names withheld from publication upon request.

The two NMA organizations provide important and distinct outlets for your philanthropy:

Donations to the NMA, our public policy arm, can be channeled to one of the most critical functions of an advocacy organization: lobbying for legislation and regulation reform favorable to the driving public.
NMA EIN 39-1422900
<https://www.motorists.org/donate>

The NMA Foundation, a 501(c)(3) corporation, offers certain tax advantages to donors. Your gifts will fund key education, research, and legal projects that make our roads safer for everyone and set important precedents on behalf of motorists.
NMA Foundation EIN 39-1951971
<https://www.motorists.org/foundation/donate>



Planned Giving Program

Section 2



Building Our Future With You!

We are pleased to offer the following gifting options. Those to the NMA Foundation offer potential tax-saving opportunities; we would be pleased to work with you and your financial advisor to design an estate plan that includes the NMA and/or NMA Foundation and is tailored to meet your goals and wishes.

Gifts of Cash: In this day and age, the traditional gift of cash is often overlooked. This is one of the simplest and most effective ways you can support the missions of the NMA and NMA Foundation.

Gifts of Stocks, Bonds, or other Securities: Your donation of stock, mutual fund shares, treasury bills, certificates of deposit, or bonds can be made directly or be transferred electronically from a mutual fund or brokerage account.

Real Estate: This type of donation may include either appreciated, developed property (such as personal residences, summer homes, farms, ranches, condominiums, and commercial or industrial real estate), or undeveloped land. You may also choose between giving an outright gift and immediate transfer of property, or arrange a retained life estate which allows you to make the gift of a personal residence while retaining the right to live there during your lifetime.

Other Appreciable Personal Property: There are numerous types of personal property that you may consider donating to the NMA and/or NMA Foundation. These include boats, works of art, jewelry, and other items of significant value. Computer equipment and office supplies are always useful.

Qualified Charitable Distribution (QCD): Those over the age of 70-1/2 who hold a traditional IRA account and have a desire to avoid taxable income on the mandatory annual minimum distribution required by the IRS can get a tax break while gifting the NMA Foundation. With a QCD, eligible supporters can make a direct-transfer rollover of some or all of the mandatory distribution amount – up to \$100,000 per year – to our nonprofit. Such gifts are among the most valuable that we have received.

Life Insurance: Donors are often able to give a great deal more through the gift of a life insurance policy than would otherwise be possible. Such gifts can take several forms – an outright gift of either a paid-up or partially paid policy, a policy that names the NMA or NMA Foundation as the beneficiary, or an existing policy where either NMA organization is listed as a contingent beneficiary.

Retirement Plans: If partial or full balances from IRA, 401k, 403 and other retirement plans are properly willed to the NMA Foundation, income and estate taxes due at the time of death can be avoided or at least minimized. Your retirement plan can be donated to the Foundation as an outright gift, a traditional bequest, a trust established through the use of retirement plan assets, or you can simply designate the NMA Foundation as a beneficiary of your plan.



Planned Giving Program



Section 3

Bequests

A bequest is an excellent way for you to perpetuate your support for the National Motorists Association and NMA Foundation. It would also enable you to make a major gift that might not otherwise be possible. In addition to cash and securities, bequests may include such assets as real estate, vehicles, works of art, antiques and collectibles, and patent rights.

When making or revising a will, you should obtain the assistance of a financial planning professional. Staff at the NMA would be pleased to work with your team to design an estate plan that includes the NMA and/or NMA Foundation and is tailored to your wishes.

Types of Bequests

- ❖ **Outright Bequest:** A direct gift of money, personal property, real estate, or a percentage of your estate
- ❖ **Conditional Bequest:** A bequest that will only be valid if your spouse does not survive you
- ❖ **Restricted Bequest:** A gift restricted to supporting a specific project or issue

Sample Language for an Outright Bequest

- ❖ **Specific Dollar Amount**
I hereby give, devise and bequeath the sum of ____ dollars (\$____) to the National Motorists Association (or NMA Foundation), Waunakee, WI 53597, to be used or disposed of as the NMA (NMA Foundation) Board of Directors deems appropriate.
- ❖ **Specific Personal Property**
I hereby give, devise and bequeath ____ to the National Motorists Association (NMA Foundation), Waunakee, WI 53597, to be used or disposed of as the NMA (NMA Foundation) Board of Directors deems appropriate.
- ❖ **Specific Real Estate**
I hereby give, devise and bequeath all of my right, title, and interest in and to the real estate located at _____ to the National Motorists Association (NMA Foundation), Waunakee, WI 53597, to be used or disposed of as the NMA (NMA Foundation) Board of Directors deems appropriate.

Bequests

Sample Language for an Outright Bequest

❖ Share of, or Entire Residue of, Estate

I hereby give, devise and bequeath all/or ___ percent (___%) of the remainder of my property to the National Motorists Association (NMA Foundation), Waunakee, WI 53597, to be used or disposed of as the NMA (NMA Foundation) Board of Directors deems appropriate.

Sample Language for a Conditional Bequest

Insert the following conditional language in one or more of the above provisions. For example:

If my husband (wife) does not survive me, I give, devise and bequeath the sum of ___ dollars (\$___) to the National Motorists Association (NMA Foundation), Waunakee, WI 53597, to be used or disposed of as the NMA (NMA Foundation) Board of Directors deems appropriate.

Sample Language for a Restricted Bequest

If you want your gift to be restricted, insert the following restriction in place of the words, “to be used or disposed of as the NMA (NMA Foundation) Board of Directors deems appropriate.” For example:

I hereby give, devise and bequeath the sum of ___ dollars (\$___) to the National Motorists Association (NMA Foundation), Waunakee, WI 53597, *for the following use and purpose* _____ *(be specific)* _____.

In the event of a gift that is subject to a restriction, we suggest including the following provision:

If, in the judgment of the NMA (NMA Foundation) Board of Directors, it becomes impossible to accomplish the purposes of this gift, the income or principal may be used for such related purposes and in such manner as determined by said Directors.

How Your Gift Will Benefit You

Your bequest to NMA organizations provides you with the peace of mind and satisfaction that your support for our shared goals of protecting drivers’ rights will continue on in the future. Also, all outright bequests to the NMA Foundation are exempt from federal estate taxes, and there is no limitation on the size of gift that you can make.



Planned Giving Program

Section 4



What Your Legacy Will Stand For

A planned gift to the NMA organizations will help ensure that our work that began in 1982 to protect and defend motorists' rights across North America will carry on for future generations.

The National Motorists Association will continue lobbying at local, state, and federal levels for legislation favorable to the driving public. The NMA Foundation will use its resources to seek out vital motorist causes that can be advanced through well-placed education, research and litigation projects.

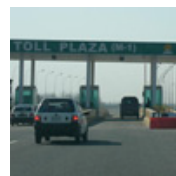
Your ongoing support of the National Motorists Association will protect and advance the individual rights that must be identified with driving, personal mobility, and unimpeded travel. That requires the establishment of rational traffic laws, honorable enforcement of those laws, and courts that dispense real justice, not predetermined verdicts. There should be no tolerance for public policies that promote or abide aberrations like speed traps, revenue-driven enforcement practices, or intrusive surveillance of motorists.

Our ability to travel when we want, where we want, and how we want is too important to take for granted. With your support, this gift of freedom will be protected for future generations. Among the key issues the NMA will continue advocating in the public forum:



Speed Limits

Speed limits should be based on sound traffic-engineering principles that consider motorists' reasonable and prudent travel speeds.



Road Tolls

The NMA opposes road user fees that limit the use of public roads especially when those funds are diverted to projects unrelated to public road improvements.



Red-Light Cameras

The NMA opposes the use of red-light cameras and proposes engineering solutions as the real fix for intersections with high accident rates.



Speed Traps

The NMA opposes the use of enforcement tactics that are intended to generate revenue from technical violations of underposted speed limits.



Surveillance Technology

The expanded monitoring of individual movement and activity on our highways also increases the risk of government overregulation and control, profiteering at the expense of responsible motorists, and the loss of driver privacy rights. Automated ticketing systems, GPS tracking devices, electronic license plate readers, roadblocks, automated tolling and taxation, and driver's licenses embedded with individual biometric data are examples of technology that the NMA will continue to watchdog as a protector of drivers' rights.



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Confidential Bequest Form

I would like to see the good works of the National Motorists Association and the NMA Foundation continue into the future

A. Please send me more information about my planned giving options. I am interested in the following (please check all that apply):

- Visionary Club
- Will or Living Trust
- Life Insurance Policy
- Retirement Program
- Gift of Cash
- Gift of Stocks, Bonds, or other securities
- Appreciable Personal Property (please specify) _____

B. I plan to include the National Motorists Association and/or the NMA Foundation as a beneficiary of my:

- Will or Living Trust
- Retirement Account(s)
- Life Insurance Policy
- Financial or Investment Account(s)
- Charitable Trust
- Other _____

My gift is /will be stated as

A specific amount: \$ _____

A percentage gift of: _____ % that currently would result in an approximate gift of \$ _____

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

This form is non-binding and does not constitute a legal promise of any future donation to the NMA or the NMA Foundation. My bequest is revocable; the information on this form reflects my current/anticipated estate plans.

Signature: _____ Date: _____

Please keep my identity confidential