



# EQUALITY CIRCLE

ENSURING THE FUTURE FOR LGBTQ EQUALITY

## Legacy Gift Planning Ideas for Friends of HRC

### A LEGACY OF SUPPORTING LGBTQ JUSTICE

Antoine McWilliams & Michael Smith

For Anthony (“Antoine”) McWilliams, his “favorite subject” is his late husband Michael Smith.

McWilliams and Smith met in 1998 — they were friends before dating and then eventually married. Michael was an executive at Coca-Cola for twenty-one years.

“ I talked with Michael about what he wanted his legacy to be. ”

Antoine was very active on the front lines of HIV work, and that’s how they became involved in LGBTQ activism.

As two Black LGBTQ men living in the South, it was a careful dance to be more visible within the LGBTQ community, but through the years, they both became more comfortable and volunteered at many organizations.

When Smith passed away in summer 2018 after a yearlong battle with lung cancer, he left money in his trust for the Human Rights Campaign. “I talked with Michael about what he wanted his legacy to be,” McWilliams said. “When giving gifts [in his memory], I ask ‘Is this something that Michael would support?’”

They decided together to include HRC as one of the organizations that benefited from Smith’s philanthropy. Smith’s legacy of supporting LGBTQ justice lives on, alongside his legacy of supporting organizations that provide scholarships to youth and more.

**For more information about creating your own legacy of equality with HRC, contact Jade Bristol Verity, J.D., Director of Estate Planning, by phone at (202) 216-1563, or email [jade.bristol.verity@hrc.org](mailto:jade.bristol.verity@hrc.org).** ■



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# FAQS ABOUT GIVING A GIFT TO CHARITY THROUGH YOUR WILL OR TRUST

## ▶ ***What are the benefits of leaving a gift to charity in my will or trust?***

- Provide support to causes you care about
- Create a legacy and ensure that your values live on for future generations
- Costs you nothing now – you retain full control of your assets during your lifetime
- Simple to create and changeable at any time
- Potential tax deduction for your estate

## ▶ ***How do I make a charitable bequest through my will or trust?***

You can designate a specific dollar amount, a percentage of your total estate, or a specific piece of property to be given to charity. Or, after first providing specific gifts for your loved ones, you can designate whatever is left over (known as the “remainder”) to charity.

## ▶ ***I already have a will or trust. Do I have to rewrite the whole thing just to include gifts to charities?***

No. Ask your attorney to prepare a simple document called a “codicil” to amend your will or trust.

## ▶ ***Should I tell the charities about my plans?***

Making sure that the charities you’ve named in your will or trust know about your intentions can benefit you in several ways.

By including the charity in the planning process, you can make sure that you have the correct language (including the charity’s full legal name and taxpayer identification number) to give to your attorney. If you’re thinking about restricting your gift to a specific use, this also allows the

charity to review your restriction to ensure they will be able to use the gift as you intend. Additionally, some charities provide benefits and recognition to people who name them in their estate plans. 🇺🇸







## HAVE YOU REMEMBERED *EVERYONE* IN YOUR ESTATE PLAN?

### Standard definitions of “children” and “grandchildren” may not be enough

One of the primary motivations for creating an estate plan is often a desire to provide for children and/or grandchildren.

The concept of the family as mom, dad, and children – who are the biological children of both parents – is rapidly making way for a much more inclusive concept of family.

Unfortunately, the law of Trusts & Estates hasn’t necessarily kept pace.

If you intend for your estate plan to provide for children of whom you are not the legal parent (such as the children of a partner to whom you are not married, step-children, grandchildren, foster children, etc.), you should carefully

review those sections of your estate plan with your attorney.

If this situation applies to your family, be wary of online will writing software, and opt for an attorney instead – it will be money well spent.

Many wills leave assets to “my children” or “my grandchildren” without naming specific individuals.

This language allows for the possibility that additional children or grandchildren will be born after the will or trust has been signed, and avoids the necessity of having to rewrite your estate plan to specifically include new children or grandchildren.

However, the law in many places is still fairly narrow and usually requires a genetic relationship and/or a legal adoption.

Although *you* may consider someone your “child,” the *law* may not.

Talk with your estate planning attorney about your family situation to make sure that the people you consider to be your “children” and “grandchildren” are covered by the language of your estate planning documents. 🇺🇸

### Create Your Free Estate Plan

We are thrilled to share HRC’s free estate planning service, in partnership with our friends at Giving Docs, as a complimentary benefit for members like you. All you have to do is use the link below to sign up and start planning your future: [hrc.im/givingdocs](https://hrc.im/givingdocs)



## JOIN HRC'S EQUALITY CIRCLE TODAY!

When you leave a gift to Human Rights Campaign or Human Rights Campaign Foundation in your will, trust, or beneficiary designation, you are eligible for membership in the Equality Circle. To activate your Equality Circle membership, visit [myplanwithhrc.org/giftnotification](https://myplanwithhrc.org/giftnotification), or send an email to [jade.bristol.verity@hrc.org](mailto:jade.bristol.verity@hrc.org).

### As a member of the Equality Circle, you will enjoy these exclusive benefits:

- Equality Circle membership certificate, lapel pin, and newsletter
- Personal liaison to HRC
- Access to HRC leadership
- Invitation to HRC's annual two-day leadership conference in Washington D.C., which includes briefings by members of Congress, HRC senior staff, and Washington insiders
- Invitations to exclusive events, VIP receptions, and political briefings
- Invitation to Board luncheon during National Dinner weekend
- Name recognition in the printed versions of HRC's annual report, National Dinner program, and your local community's dinner program (*HRC never publishes the names of our donors online, in order to protect your privacy*). You may also choose to remain anonymous if you prefer not to have your name printed, and this will not affect your other Equality Circle benefits.
- Name permanently engraved on the "Wall of Hope" in the HRC building lobby (for realized estate gifts of \$10,000 or more).

### Sample Bequest Language

"I give and bequeath \_\_\_\_\_%  
[or \$\_\_\_\_\_] to the Human  
Rights Campaign [or Human  
Rights Campaign  
Foundation], Federal Tax I.D.  
\_\_\_\_\_, located at 1640  
Rhode Island Avenue N.W.,  
Washington D.C. 20036, for  
its general purposes."

### Tax I.D. Numbers

Human Rights Campaign  
52-1243457

Human Rights  
Campaign Foundation  
52-1481896

### We want to hear from you!

Understanding the motivations  
behind your support of HRC is  
extremely important to us. Please  
help us get to know you better by  
completing this brief survey:

[hrc.im/2021Survey](https://hrc.im/2021Survey)

Have you created a legacy gift to support  
HRC's work through your will, trust or  
other estate plan? Let us know at  
[hrc.im/mygift](https://hrc.im/mygift)



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