



EQUALITY CIRCLE

ENSURING THE FUTURE FOR LGBTQ EQUALITY

Legacy Gift Planning Ideas for Friends of HRC

HELPING HRC CONTINUE TO FIGHT

Jennifer & Elizabeth Firth's gift will impact future generations

Growing up in a strict, conservative family in Florida in the early 1970s, Jennifer Firth spent most of her time reading, often wanting to disappear. By the 7th grade, she was aware that the gender assigned at birth did not match how she felt or thought about herself. But, like so many others during that time period, she kept her feelings private. She didn't know any LGBTQ people in her community and it wasn't until college that she realized that she wasn't alone.

“ We need an organization that's going to continue to fight – even after equality laws are passed. ”

Elizabeth Firth was raised in the South in a highly religious family during the same time and, similar to Jennifer, didn't meet anyone else who was openly LGBTQ until college. Elizabeth never defined her sexuality until the term “pansexual” came into use years later.

Jennifer and Elizabeth met in Boston shortly after Jennifer graduated from college. They quickly became a couple and married in 1992.

Jennifer had a successful career designing, manufacturing and consulting on medical devices. During that time she lived a split life. In her professional life, she presented as a man; at home she lived authentically as a woman. Not expecting to be able to continue working in her career field if she transitioned, Jennifer lived like this for more than two decades. With Elizabeth's constant love and support, Jennifer decided to transition in 2014. She was thrilled that her managers and co-workers supported her, and the women she worked with began including her in the women's social events they organized.

At around the same time, the couple decided to include a gift to HRC in their estate plans.

“We need an organization that's going to continue to fight – even after equality laws are passed,” Jennifer Firth said. “We want to help an organization that is active both politically and educationally.”

In addition to their generous estate gift, Jennifer and Elizabeth support HRC as annual major donors. The Firths remain optimistic about the future and hope that HRC will continue partnering with global organizations and supporting LGBTQ children and families. □



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IS A PET TRUST RIGHT FOR YOU?

COMPANION ANIMALS are members of the family, and your estate plan can help provide for their care should you become unable to care for them yourself. Many people choose to provide for their companion animal's future through a bequest in their will or revocable living trust, or through a separate document called a "pet trust."

PET TRUSTS

A pet trust names a caregiver for your companion animal when you are no longer able to take care of them yourself.

The trust can take effect either after you pass away or during your lifetime if you become incapacitated.

You will need to fund the trust with a reasonable amount of money to be used for the care and comfort of your companion animal as well as any fee you wish to pay the caregiver.

As of now, all 50 states and the District of Columbia have enacted pet trust laws, but these laws vary state by state, so it's important to consult with an estate planning attorney about pet trust laws in your state.

BEQUESTS

An alternative to creating a pet trust is to provide for your companion animal through a provision in your will or revocable living trust.

Because companion animals are legally considered to be personal property, you can bequeath them to a caregiver, along with an amount of money to provide for their care.

Regardless of how you choose to provide for your companion animals, you should consider the following:

- ❗ What is your companion animal's life expectancy?
- ❗ What standard of care do you want for your companion animal?
- ❗ Who is the best person to care for your companion animal?
- ❗ How much will you need to set aside to ensure your companion animal's future care?
- ❗ If there is money left over at the end of your companion animal's life, where would you like it to go?

Your estate planning attorney can provide additional guidance to help you select the best way for you to provide for your companion animal.

If you don't have an attorney, ask friends, relatives, your local bar association, or call Jade Bristol Verity, J.D., HRC's Director of Estate Planning, at (202) 216-1563. □





ESTATE PLANNING FOR YOUR DIGITAL ASSETS

MOST ESTATE PLANS create a plan for distributing your tangible assets – your home, cars, bank accounts, personal property, etc.

It’s also important for your will or trust to leave instructions regarding your digital assets, even if your digital assets have no monetary value.

Digital assets include things like electronically stored photos and documents, domain names or other intellectual property you own, email and social media accounts, online financial or shopping accounts and passwords. Your estate plan can give specific permission to your fiduciaries to recover or

reset your passwords. This may help ensure that important photos and documents aren’t lost and that your social media accounts can be shut down. If your estate plan doesn’t already include a provision for who can access your digital assets, it may be time to talk to your attorney about updating your documents. □

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

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



Jade Bristol Verity, J.D.
Director of Estate Planning
202-216-1563 phone
240-994-2665 cell
jade.bristol.verity@hrc.org



IS IT TIME TO UPDATE YOUR ESTATE PLAN?

If you're like many people, updating your will or trust is one of those tasks that often ends up at the bottom of your list of things to do. The risks of not acting, however, can be significant. Take this quiz to quickly determine if it's time to update your plan.

If you answer **YES** to any questions in the left column or if you answer **NO** to any questions in the right column, you should review these answers with your estate planning attorney to determine how to update your estate plan.

YES **NO**

- Since you created your estate plan, have you gotten married or are you contemplating marriage?
- Has there been a birth, adoption, divorce or death in your family?
- Have you moved to a new state?
- Have you recently purchased a home or other asset with another person?
- Have your wishes for your end-of-life healthcare changed?

YES **NO**

- Are the people you have designated to act on your behalf in case of disability or death still the individuals you wish to serve in that capacity?
- Does your estate plan provide for your digital assets?
- Have you left instructions and funds for the care of your companion animals?
- Do your beneficiary designations for your retirement accounts and life insurance accurately reflect your wishes?
- Have you named a beneficiary for your donor-advised fund?
- Is your estate plan an expression of your values? Are there any charities you have supported during your lifetime that you would like to leave a gift to through your will or trust?

 **EQUALITY CIRCLE**
HUMAN RIGHTS CAMPAIGN
ENSURING THE FUTURE FOR LGBTQ EQUALITY

**Human Rights Campaign &
Human Rights Campaign
Foundation**

1640 Rhode Island Ave., N.W.
Washington, D.C. 20036-3212
www.hrc.org