

EQUALITY CIRCLE

ENSURING THE FUTURE FOR LGBTQ+ EQUALITY

Legacy Gift Planning Ideas for Friends of HRC

A LEGACY OF LOVE AND EQUALITY

When it came time for Patricia and Adriann to create their estate plans, they knew they wanted their legacy to reflect the values they hold most dear—particularly equality. Though they humbly describe themselves as not having much, they've always believed in using what they *do* have to make a difference. That's why they chose to include the Human Rights Campaign in their estate plans.

As they considered the organizations that had shaped their lives and values, HRC quickly rose to the top of the list. Their gift wasn't just about a financial contribution; it was about investing in a future where justice, dignity, and equality are realities for all.

Their decision to leave a legacy gift to HRC came from a desire to make an impact that extends beyond their lifetimes. Patricia

and Adriann believe strongly that meaningful change takes time, resources, and unwavering dedication.

“It's going to cost a lot to repair the injustices of the world. Whatever we can contribute to that repair—through our legacy—we're honored to do it.”
— Adriann

Patricia and Adriann hope to be remembered as a fun, generous couple who stood firmly for what they believed in. For them, HRC is not only a cause they support—it's an organization that supports them as Black women and members of the LGBTQ+ community. HRC has helped them feel seen, valued, and empowered.



Their legacy gift is a testament to their belief in equality for all—and in HRC's ability to continue leading the fight long into the future. Through their planned gift, they are ensuring that their values live on and that future generations benefit from the progress they've helped fund.

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ESTATE PLANNING FOR LGBTQ+ INDIVIDUALS AND FAMILIES

Estate planning is more than just paperwork—it's about protecting the people you love and the life you've built. For LGBTQ+ individuals and families, a comprehensive estate plan ensures your wishes are honored and your chosen family is recognized—especially in a legal system that doesn't always do so automatically.

But creating a plan isn't a one-time task. As life evolves, so should your estate plan. Even if life feels stable, reviewing your plan every **3 years** helps ensure it still reflects your values, relationships, and legal protections. Below are some helpful tips and best practices:

Times to Revisit Your Plan:

- ✓ Marriage, divorce, or the end of a partnership
- ✓ Birth or adoption of a child
- ✓ Loss of a loved one
- ✓ Relocation to a new state
- ✓ Retirement or major job changes

If someone you've named (executor, guardian, healthcare proxy) is no longer appropriate, update your plan promptly.



Keep Beneficiaries Current

Beneficiary designations on retirement accounts, life insurance, and Payable on Death (POD) accounts override your will or trust. Review them regularly to avoid unintended outcomes.



Monitor Laws and Rights Changes

Inheritance and healthcare laws vary by state—and may not fully protect LGBTQ+ families. Stay ahead by reviewing your plan with an LGBTQ+-affirming estate planning attorney.



Update with Life and Legacy Changes

New assets, debts, or changes in your giving priorities should be reflected in your estate plan. As children grow, you may want to name them in trusted roles or update milestone-based trusts.



Protect Your Health

Ensure your healthcare proxy, Power of Attorney, living will, and HIPAA release are up to date so your partner or chosen family can advocate for you.

Get Started Today!

HRC proudly offers you free access to **Giving Docs**, an easy-to-use online platform where you can create your will and other essential estate planning documents. Visit hrc.im/givingdocs to begin protecting what matters most.

HOW ESTATE PLANNING CAN FIT EVERY STAGE OF LIFE

Estate planning isn't just for retirees or those with large estates. It's a powerful, flexible way to support the causes you care about—at every stage of life. Whether you're raising a family or enjoying retirement, there are meaningful ways to make a lasting impact.



40s & 50s: Growing Assets, Growing Impact

At this life stage, many people are thinking about family, aging parents, and financial goals. It's also a natural time to revisit your estate plans. Planned gifts can support the causes you love and offer tax advantages.

Planning tools for this stage:

- ✓ Charitable bequests and trusts
- ✓ Life insurance or retirement account beneficiary designations
- ✓ Donor-advised funds (DAFs)
- ✓ Gifts of appreciated stock



60s & 70s: Retirement & Legacy Planning

As you plan for retirement, estate planning can help you meet your philanthropic goals while providing income and tax benefits. For many, this is also a time to reflect on their legacy and the values they want to pass on.

Planning tools for this stage:

- ✓ Qualified Charitable Distributions (QCDs) from IRAs
- ✓ Estate plan updates to reflect charitable priorities
- ✓ Endowment or legacy gifts in honor of a loved one



80s and Beyond: Stewarding a Legacy

An estate plan ensures your values live on. Reaffirm your charitable commitments, confirm beneficiary designations, and notify the organizations you care about.

Planning tools for this stage:

- ✓ Finalizing or reviewing your will or trust
- ✓ Updating charitable gift annuities or endowments
- ✓ Notifying nonprofits of your intentions for recognition and stewardship

NO MATTER YOUR AGE— YOUR LEGACY MATTERS

Planned giving is not about wealth; it's about *intention*. With the right tools and guidance, anyone can create a lasting legacy.

Contact us at legacyplanning@hrc.org to learn about the many ways you can support HRC with your planned gift.





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, or send an email to legacyplanning@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 leadership conference in Washington, D.C., which includes briefings by government officials, HRC senior staff, and Washington insiders
- Invitations to exclusive events, VIP receptions, and political briefings
- Name permanently engraved on the "Wall of Hope" in the HRC building

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!

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.



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