



**Your**

**legacy**

**of community**

**change**

**COMMUNITY**  
Power from the  
ground up **CHANGE**

# JOIN THE LEGACY SOCIETY ON THE PATH TO POWER

IN 2018, COMMUNITY CHANGE MARKED 50 YEARS OF BUILDING POWER FROM THE GROUND UP.

We embarked on a project of transformational change with our 15-year *Path to Power* plan, and we launched the Community Change Legacy Society to sustain the movement for a just, equitable, and inclusive democracy and economy.

Two years later, our country is facing some of its greatest challenges and most hopeful opportunities in the past century. This pivotal moment calls for radical shifts in the distribution of power — and it highlights Community Change's critical role. We fuse the power of organizing, ideas, and politics to fuel movements led by people directly affected by interlocking systems of oppression. We work not only to dismantle these systems, but also to reconstruct a country where everyone can thrive.

We can take on this vital calling for one reason: the generosity of people, including you, who share our vision of justice and who have powered our work with your contributions.

Our Legacy Society is a statement of purpose in these times. Through planned gifts, Legacy Society members lay the foundation for Community Change's next half-century in the forever unrealized struggle for equity and justice.

Since our founding in 1968, Community Change has fought to put the priorities of struggling people at the heart—not the margins—of our country's agenda:

- We launched the nation's largest grassroots coalition for immigrant rights—and 20 years later, it continues to unite the field's power in the fight for immigrant justice.
- We have won policies that channeled billions of dollars into low-income communities—and we made sure that leaders in those communities held policy makers accountable.
- We trained generations of social-justice leaders—and we continue to create new approaches to unlock the vision and leadership in our communities, particularly among women of color.

Your partnership has carried us through these fights, from 1968 to the urgent moment of today. Make your legacy one of striking out against injustice. We invite you to join us on the *Path to Power*.

In hope and solidarity,



Dorian Warren  
President, Community Change

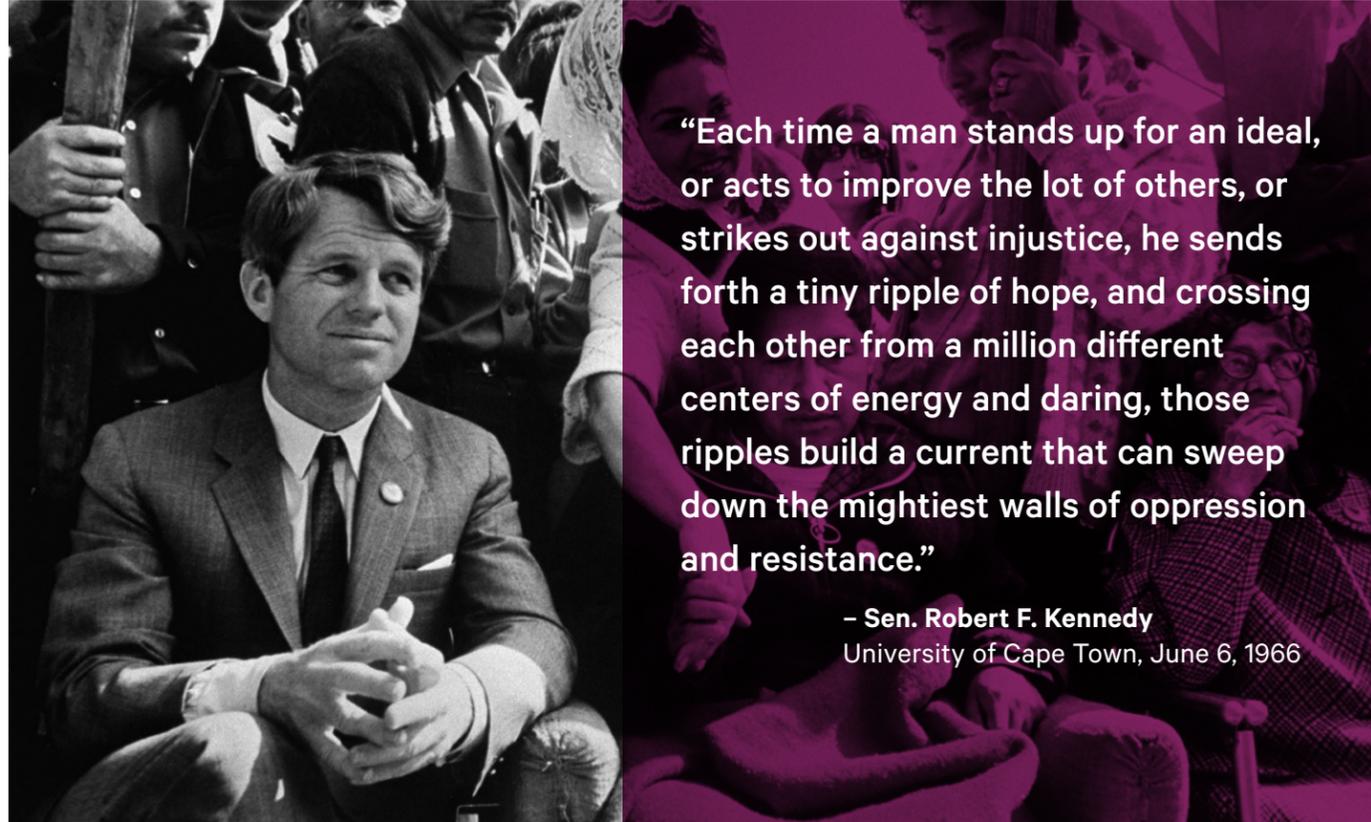


Lorella Praeli  
President, Community Change Action



This brochure contains general gift, estate, and financial planning information for educational purposes. It does not provide legal or tax advice. For advice or assistance on specific gifts and decisions please consult an attorney or other professional advisors.

# POWERFUL LEGACIES



“Each time a man stands up for an ideal, or acts to improve the lot of others, or strikes out against injustice, he sends forth a tiny ripple of hope, and crossing each other from a million different centers of energy and daring, those ripples build a current that can sweep down the mightiest walls of oppression and resistance.”

– Sen. Robert F. Kennedy  
University of Cape Town, June 6, 1966

It was 1968. The Vietnam War raged, and the struggle for civil rights—for Black Americans, Native Americans, farmworkers, women, and LGBT people—reached the boiling point. That spring, two incomparable leaders, Dr. Martin Luther King, Jr. and Senator Robert F. Kennedy, were assassinated.

Community Change was born into this world on fire, when leaders of the civil rights, anti-poverty, and union movements came together to create an organization that would carry the vision and values of social justice into the future. For the past 50 years, we have fueled a bold, enduring movement for a nation where all people and communities can thrive.

**In this moment of instability and uncertainty in our country, Community Change is steadfast. With your support, we will embark on the next 50 years strong, resilient, and ever more deeply dedicated to helping America live up to its democratic promise.**

Since 1968, Community Change has been bringing people together across the United States to lift up and empower communities, fight poverty, strengthen the social safety net, and ensure that our democracy truly works for all. In this unprecedented time, we renew our commitment to build a more just and inclusive America. If we answer the demands of this moment, we will permanently shift our economic framework to provide security and care for all Americans.



Photo third row left courtesy of MN Neighborhoods Organizing for Change.

# PLANNED GIVING OPPORTUNITIES

## SIMPLE & LASTING

A planned gift to Community Change affirms your confidence that Community Change will continue to make a difference in the lives of future generations. Such bequests:

- Are easy to arrange
- Will not alter your current lifestyle in any way
- Can be easily modified to address your changing needs

If you are contemplating including Community Change in your estate plans, please consult your attorney or accountant for the vehicle that best meets your needs. There are many ways to make a planned gift to Community Change.

## HOW YOU BENEFIT

- You avoid potential estate tax on retirement assets
- Your heirs avoid income tax on any retirement assets funded on a pre-tax basis
- You receive potential estate tax savings from an estate tax deduction

## WHAT YOUR LEGACY CAN DO

Besides choosing how your planned gift will come to us, you also have a say in how it will be used and acknowledged:

- Make the gift unrestricted—it will be used for the top priority needs in Community Change's ongoing and timely work.
- Consider a restricted gift with guidance from Community Change's staff about programs and future areas of focus.
- Memorialize or honor a loved one: "This gift is made in loving memory of \_\_\_\_\_, who shared Community Change's passionate dedication to the fight for social justice."

## DID YOU KNOW?

Your heirs may forfeit 60-70% of your retirement assets to the IRS at your death? As a 501(c) (3) nonprofit, Community Change is not taxed on these or other retirement assets. Other assets such as real estate and stock are taxed at lower levels, so by structuring your planned giving with tax benefits in mind, you have the greatest control possible on your ongoing impact.

**Your support of Community Change reflects your commitment to a just, equitable, and inclusive democracy and economy.**

**Your gift to Community Change continues your impact beyond your lifetime.**

## JOINING COMMUNITY CHANGE'S LEGACY SOCIETY REQUIRES JUST TWO STEPS

Planned Giving to Community Change is not complicated and does not require a minimum contribution, only a thoughtful intention to make a difference by identifying Community Change in your plans.

**STEP 1** Consult with your family, attorney, and/or financial advisors and designate Community Change as beneficiary in your estate plans.

You will need to complete a beneficiary designation form provided by your retirement plan custodian. If you designate Community Change as a beneficiary, Community Change will benefit from the full value of your gift, because your IRA assets will not be taxed. Your estate will benefit from an estate tax charitable deduction for the gift.

**STEP 2** Notify Community Change of your intent to give a planned gift.

Please contact Beth Rayfield, Director of Institutional Advancement at [brayfield@communitychange.org](mailto:brayfield@communitychange.org) or 202-339-9365 or visit our website and complete the Declaration of Intent Form at: [communitychange.org/community-change-legacy-society](https://communitychange.org/community-change-legacy-society). All information will be kept confidential.



Photo courtesy of Markus Spiske, Pexels

# GIFT MADE THROUGH YOUR WILL: BEQUEST

A charitable bequest is the simplest planned giving opportunity. It is a distribution from your estate to a charitable organization through your last will and testament. There are different kinds of bequests. Each requires very specific language to indicate the precise direction of your assets, and guide the executor of the estate to carry out your wishes.

**Plan now and give later.** Name Community Change in your will or living trust by designating:

- **A Specific Amount**—You may choose a fixed dollar amount.
- **A Percentage**—You may designate a percentage of your estate to Community Change, allowing your gift to remain in proportion to the size of your estate.
- **The Residue**—You may give what is left in your estate after other distributions have been fulfilled.
- **Contingency Bequest**—You may leave a portion of your estate to Community Change if your named beneficiary does not survive you.

## Sample bequest language:

If you are considering a bequest to Community Change, here is some suggested wording to take to your attorney or estate manager:

*After fulfilling all other specific provisions, I give, devise and bequeath \_\_\_ % of the remainder [or \$ \_\_\_ ] of my estate to the Center for Community Change, a charitable corporation [Tax ID#52-0888113] currently having offices at 1536 U Street, NW Washington, DC 20009.*



**Jackie Jenkins-Scott**  
Founding Legacy Society Member

I'm honored to be a founder of the Legacy Society. By joining the Legacy Society, I want to ensure that **Community Change continues to be a viable and effective advocate for society's most vulnerable well into the future.**



**Judy Patrick**  
Founding Legacy Society Member

I have devoted my working years to social justice issues, particularly those impacting women, people of color, and those living in poverty. For over 50 years, Community Change has been changing the lives of these constituents. **It only makes sense that I make a legacy gift to ensure a strong future for Community Change and to continue the work that is so important to me during my lifetime.**

*We recommend that you consult with your attorney or tax advisor to determine the tax benefits and restrictions that apply to your specific situation. Community Change staff is available to you and your advisors to answer questions regarding your gift and its future impact in our communities.*

# GIFT MADE THROUGH YOUR WILL: BENEFICIARY

**A) Retirement Plan Assets:** You may donate all or part of your unused retirement assets, such as your IRA, 401(k), 403(b), pension, or other tax-deferred assets.

## B) IRAs:

- People age 70 1/2 and older can make charitable gifts (called Qualified Charitable Distributions) directly from Individual Retirement Accounts (IRAs) using funds that might otherwise be taxed when withdrawn. Gifts can be in any amount up to a total of \$100,000 per individual per year or, \$200,000 per couple.
- Gifts directly from your IRA will offset investment gains, decreasing your taxable income and offsetting some portion of your Required Minimum Distribution (RMD).
- For questions about the benefits of giving through your IRA, please contact your financial advisor and/or accountant.

**C) Life Insurance:** You can designate Community Change as a full, partial, or contingent beneficiary of your life insurance policy, which makes a substantial donation to Community Change for a relatively modest annual cost.

- **Community Change as Beneficiary**—You can name Community Change as the beneficiary of a life insurance policy while retaining ownership of the policy and access to the cash value. However, because you retain ownership and can change the beneficiary, no income tax charitable deduction is allowed for the value of the policy.
- **Survivorship Life Insurance**—Also known as “second-to-die insurance,” the lives of two people are covered under this form of insurance. When the second insured passes, the policy’s benefits can be payable directly to Community Change. This form of life insurance is less expensive than others, enabling you to make a larger charitable gift than you might otherwise consider.
- **Community Change as Owner**—If you assign a paid in full insurance policy to Community Change as its owner, you can claim a federal income-tax charitable deduction for the policy’s fair-market value or the net premiums paid, whichever is less. If the policy is not paid in full, you may deduct your subsequent premium payments on behalf of Community Change.

## Other Assets/Bank or Brokerage Accounts:

- **Bank Accounts or Certificates of Deposit**—You may place a designation on your bank account or certificate of deposit that names Community Change as the beneficiary of all funds once you (the account owner) pass away. This is a simplified, no-cost way of making a planned gift. The bank or financial institution where your assets are held can assist you with this by placing your asset in a trust (often called a Totten Trust or “Payable/Transferable upon Death” Account).
- **Cash**—If you are distributing your estate now, while you are still living, maximize the deduction and minimize the mechanics and paperwork by writing a check or giving online to Community Change now.
- **Securities**—Avoid tax on capital gains; afford a larger gift to Community Change. Contribute long term appreciated stock or other marketable securities.

# LEGACY SOCIETY FOUNDING MEMBERS

Aaron Dorfman &  
Geneen D. Massey

Bill Dempsey

Carol M. Barger

Cecilia Ortiz

David Friedman

Deepak Bhargava

Diane Feeney

Donna Katzin

Dorian T. Warren

Ed & Jan Booth

Garlin Gilchrist II

Jackie Jenkins-Scott

James Gollin

Jane E. Fox-Johnson

Judy Patrick &  
Candice Dickinson

Kelly Brown

Mary M. Lassen &  
Martin Liebowitz

Mary Morris Willis

Miriam Rabban

Paulette J. Meyer

Tim Sweeney

Vivian Chang

Community Change has done extraordinary work over the last 50 years, but sadly much still needs to be done. **With a legacy gift, I'm helping to assure that the work continues for another 50 years.**



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**James Gollin**  
Founding Legacy Society Member



## ADDITIONAL INFORMATION

You should always consult your attorney when drawing up or revising your will to ensure your intentions are clearly stated, particularly given the complexity of tax law. The legal name of Community Change is: Center for Community Change, a tax-exempt organization located at 1536 U Street NW, Washington, D.C. 20009. The tax ID number is 52-0888113. The name and address to include in your will is:

Center for Community Change  
1536 U Street NW  
Washington DC 20009

If you have any questions or need additional information, please call the Institutional Advancement Department at (202) 339-9365 or visit our website: [communitychange.org/community-change-legacy-society](https://communitychange.org/community-change-legacy-society)

*Community Change is a 501(c)(3) non-profit organization with an affiliated 501(c)(4) advocacy arm, Community Change Action. Although the two sister organizations share a mission and vision for the world, they operate independently and in compliance with applicable law.*

I am a proud founding member of the Legacy Society supporting the community organizing and empowerment that changed my life and propelled it forward. **Community Change helps people realize and act upon the power that exists within their hearts and experiences—a practice that must continue for our world to be one in which everyone can thrive.**



**Garlin Gilchrist II**  
Founding Legacy Society Member

I believe that Community Change's mission to empower low income communities, particularly those of color, is critical work for our society to undertake at this time. **Community Change is extraordinarily effective at training people on the ground to build strong social movements.** In addition, Community Change powerfully advocates for policies that benefit these marginalized communities. I cannot think of a more competently run organization doing this level of work to create a more just and equitable world.



**Mary Willis**  
Founding Legacy Society Member

I have never been more proud of the work of this organization, and never more convinced of its importance, especially in light of the challenges we face to our deepest values and to our democracy itself. **We are each part of a lineage of people working to advance social justice that extends thousands of years before we were born and will extend thousands of years after we're gone.** That is a sacred responsibility, and I'm committed to supporting it throughout my life and after I'm gone.



**Deepak Bhargava**  
Founding Legacy Society Member  
Former President of Community Change

# COMMUNITY CHANGE

1536 U Street NW, Washington, DC 20009 | 202-339-9300 | [communitychange.org](http://communitychange.org)