

Sojourners Planned Giving: RETIREMENT ASSETS

No Sojourner needs to pay for future wars.

No Sojourner needs to sponsor future injustice.

Every Sojourner is called to take care of the needs of “the least of these” today and tomorrow

Retirement Assets are not normally part of a will. Remembering Sojourners with a gift from your estate will help sustain and strengthen the organization in years to come instead of funding future wars and other injustices. YOUR decisive action TODAY will provide for your family in the future and preserve your legacy!

“Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up.”

- Galatians 6:9

A few facts about Retirement Assets:

- **A bequest costs nothing now ...** you have the satisfaction of knowing you have provided for your future Sojourners – those who YOU have inspired to care for those Jesus called “the least of these” whose lives are disrupted by war, poverty, inequality, racism, sexism, climate change, and greed.
- **You retain control** of the distribution and use of your assets – if you don’t, the state will decide for you who receives your assets when you are gone.
- **Your loved ones receive the benefit** of exemption from federal estate taxes.
- **We will thank you now** and recognize you as a member of our Legacy Circle if you let Sojourners know of your plans.

Most importantly,

- You are giving a gift when you no longer need the assets
- YOU MAKE a statement about WHO is important to YOU in this world.

Please cut here and keep this important information below where you can easily find it.



To leave a gift from your retirement assets:

Step One: Contact your administrator.

Step Two: Complete the “Change of Beneficiary Form

Step Three: Let us know!

Information you will need:

LEGAL NAME: SOJOURNERS

EIN 23-7380554

"In a spider's web each individual strand is weak and easily breaks. But when tied together, the web forms a durable and powerful force; as the Ethiopian proverb says, 'When spider webs unite, they can entangle a lion.'"

The world faces lions in many forms. The pressing question remains: Will you join the web of creatively maladjusted, dedicated to mobilizing hope for their community and world? If not now, then when?"

- Adam Taylor, Board Chair & Sojourners' Legacy Circle Member



In practice, the gift of **retirement assets** is simple, revocable and an important way to support our work in future. **Your retirement gift to us will:**

- Reduce the tax burden on your estate
- Benefit Sojourners 100%

Some important information about retirement gifts:

Retirement Savings form a significant part of working Americans' assets. They include:

- Individual retirement accounts (IRAs), 401 (k) or 403 (b) plans; Private pension plans;
- State, local, and federal government pension plans;
- Annuities;
- Certain taxable money for earmarked for retirement, such as stock you inherited from a deceased relative.

If Sojourners is named as a beneficiary of your retirement plan, our mission and work will receive the full value of what is distributed to us as a gift from your estate, as a legacy of your life.

Sojourners can provide you with an instruction letter to your fund administrator.

This information is not intended as tax or legal advice. We recommend that you consult with your financial advisors to learn how a gift would work in your circumstances. Laws and regulations governing all gifts and availability of certain life income gifts vary by state.

Did You Know?

"50% to nearly 90% of a retirement account can be lost to estate and income taxes."

Julie Garber, What Happens to Retirement Accounts After Death?

YOUR LEGACY PLANNING GIVING CONTACT:
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sojourners
Faith in Action for Social Justice