

# A Legacy of Empowerment

Guide to Leaving a Gift to CPLC in Your Will



**CHICANOS  
POR LA  
CAUSA**





Thank you for considering a gift to Chicanos Por La Causa (CPLC) in your will.

Writing a will can seem like a daunting process. We created this guide and included some free resources to make it easier to plan for the future.

None of us know what will happen in the future, but we can provide ourselves and our loved ones some security by making a plan. Creating a will or trust gives you peace of mind, knowing that your loved ones and the causes you care about will be protected.

50 years ago, a group of Latino high school students in Phoenix were denied equal access to a college education because of their ethnicity. These students came together to stand up for their rights and demand equal treatment. Because of their work, school policies were changed. Dreams were achieved. And their movement, which they called Chicanos Por La Causa, was born.

None of those students could have guessed that 50 years later, CPLC would still be standing to fight for equal opportunity for all people. Today, we work to ensure that everyone—without discrimination—has access to a quality education; safe, affordable housing; accessible healthcare; fair political representation; and meaningful work to support themselves and their families.

We've come so far since then, but I'm constantly reminded how much there is still left to do. Whatever the future holds, with your support, CPLC will be there to defend these values for future generations.

Thank you again for considering a gift in your will. Your trust in CPLC is appreciated.

Sincerely,

**DAVID ADAME**

President & CEO

Chicanos Por La Causa, Inc.





Like you, we believe that a person's ability to succeed in this country should not be determined by their race, ethnicity, religion, gender, or zip code. We work towards a future in which **all** people have the opportunity to achieve the American Dream. With a gift in your will, you can ensure that this critical work continues into the future.

1969  
CPLC  
FOUNDED IN  
PHOENIX, AZ

1972  
CESAR CHAVEZ  
PERFORMS  
FAST AT CPLC  
HEADQUARTERS

1978  
CPLC FOUNDS  
FAMILY  
IMMIGRATION  
PROGRAM

1986  
CPLC  
ESTABLISHES  
DE COLORES  
DOMESTIC  
VIOLENCE  
SHELTER

1996  
CPLC STARTS  
EARLY  
CHILDHOOD  
DEVELOPMENT

2005  
CPLC FORMS LA  
CAUSA REALTY  
IN TUCSON, AZ

2011  
CPLC EXPANDS  
INTO NEVADA,  
FOLLOWED BY  
NEW MEXICO  
IN 2013

2019  
CPLC  
CELEBRATES  
50TH  
ANNIVERSARY







“ I consider myself blessed to have been able to personally observe the essential services that CPLC provides to individuals and families in need for 19 years of my life. My sincere wish is that CPLC will continue to be the same force for good for as long as the need exists.

“To help ensure, in a small way, that resources remain available to carry on their essential mission, I will be bequeathing a financial donation to CPLC to be released as part of final settlement of my assets. **I hope that you will consider making a similar pledge to help CPLC to remain a trusted source for good in the community.**”

—John Ramirez, CPLC Executive Vice President (Retired)

Your will enables you to provide for your family and loved ones. It is also an opportunity to help ensure that all people—without discrimination—have access to a quality education, affordable housing, accessible healthcare, political representation, and meaningful work.

We hope you will consider a gift to CPLC in your estate plans. Our staff can help you make a plan that takes care of your family, reduces your taxes, and makes an impact on your community in the future. Please call **(602) 257-5519** or email **give@cplc.org** if you have any questions.

## Why You Need To Plan Your Estate

One of the most important documents you will sign in your lifetime is your will. Yet, often people put off the preparation of a will until it is too late. Complicated legal language and uncertain costs can make this task easy to postpone.

That is why CPLC is pleased to provide you with this will-writing guide. It will help you think through everything that you need to write your will, and it will help resolve some of the anxiety or questions you might have about estate planning.

A will gives you the last word on what happens to your estate upon your death. You ensure the care of minor children or dependents. You help protect the value of your estate from unnecessary taxes or legal costs. You help minimize conflict among family by telling them your wishes. And you can provide gifts to your loved ones and causes you believe in. More importantly, it gives you and your loved ones peace of mind.



## The Terri Cruz Legacy Society

Donors who leave a gift to CPLC in their will or estate plan are invited to join the Terri Cruz Legacy Society, so that their generosity may be remembered and that they may inspire others to give.

Teresa “Terri” Cruz worked as a house cleaner for 22 years until her integrity and strong faith moved her to a career in social services.

She met a group of young Chicano activists and became involved in what would become Chicanos Por La Causa. She helped to shape the mission of the organization and was one of the three signatures on CPLC’s Articles of Incorporation in 1969.

Terri spent the rest of her life advocating for people in need. Upon receiving the 2012 Arizona Latina Trailblazers Award, she stated her motive succinctly: “You do it because it’s in your heart to do it. You don’t do it because you want to be recognized and have someone pat you on the back.”

Terri worked at CPLC until her final days. Her life truly demonstrates what it means to leave a legacy.

To join the Terri Cruz Legacy Society, give us a call at **(602) 257-5519** or email us at **give@cplc.org**.



## What's In a Will?

### SELECTION OF AN EXECUTOR

Your executor is the person with whom you entrust your assets at the time of your death. They maintain and keep secure the estate's assets for distribution. You should confirm that the person you select is willing to act as your executor.

You can use your will to nominate the person you most want to serve as your executor and even name alternate options in case your first choice is unable or unwilling to serve.

Once your executor has been approved by the local court, he or she will be legally empowered to take actions to wind up your estate; for example, your executor can distribute your property as specified in your will, sell off other property of yours if necessary to satisfy your outstanding debts and taxes, and close your financial accounts.

### SELECTION OF A GUARDIAN OF YOUR MINOR CHILDREN

If you have children, one of the most important provisions in your will is the appointment of guardians for any children still under 18 at the time of your death. This ensures that the best interests of your children are safeguarded after your death. By default, the other parent of your child will be designated as guardian; you can enter second and third choices in the case that the other parent is not alive at the time of your death. You can also establish a separate financial guardian (conservator) who attends to the financial affairs of your children until they are adults.

### NAMING OF BENEFICIARIES

A beneficiary is a person or organization who will receive a gift or inheritance from your estate. The beneficiaries of your will can include your spouse, children, other relatives, friends, and charities.

You can use your will to specify that a piece of property you own or a specific sum of money should be given to a certain beneficiary. For example, you might choose to leave a family heirloom to your grandchild. You can also use your will to indicate who should receive the property that remains after all the specific distributions you've listed are made. This represents the "residue" of the estate. Both specific and residual bequests can be left to any beneficiary.

### SIGNATURE OF WITNESSES

A will also requires the signatures of witnesses to the will's execution declaring that the will-maker appeared to be of sound mind and memory and that the will did not appear to have been procured by fraud or duress.

## Things to Know about Creating Your Will

### AMENDING YOUR WILL

Once you have prepared your original will, it is always open for you to change your mind and amend its provisions. This may be done through a new will or by preparing a document called a codicil, which is then attached to your original will. Once made, a will should be regularly reviewed and revised to account for significant changes in your personal assets; the death of your spouse or a change in your marital status; any change in the status of your dependents; any change in your residency or location of assets.

### WHAT HAPPENS IF YOU DIE WITHOUT A WILL?

If you die without a will, local law determines who receives your assets. The probate court will determine who your legal heirs are and then appoint someone to distribute the estate. No gifts will be made to friends, church, or favorite charity. Your jointly held assets may pass to the surviving owner. A court-appointed executor may also have to post a bond—an additional cost to your estate. According to a recent survey, about 60% of the American population do not have a will, which means the specifics of their wishes would remain unknown if they pass away.

### POINTS TO REMEMBER ABOUT MAKING YOUR WILL

- A properly executed and up-to-date will ensures that your wishes are followed. If you have not made a will or have not recently updated it, you should do so now. Think carefully about what people, needs, causes, or institutions you would like to benefit from your will.

- A quality online will-writing service such as [www.freewill.com](http://www.freewill.com) can help you write your own legal will from scratch that meet the requirements of your state of residence. If you do choose to write your will online, be sure to use a quality service that is recommended by trusted sources, such as AARP. If you have a complicated estate or complex wishes, you may choose to seek the counsel of a qualified attorney.
- Name an estate executor(s) whom you trust to carry out your wishes.
- If applicable, make sure your spouse also has a current will.
- We encourage you to provide first for your loved ones, then consider a gift to Chicanos Por La Causa.

### INFORMATION TO GATHER BEFORE STARTING YOUR WILL

You will want to gather information about all of these items before visiting with an attorney or using a will-writing program online:

- **Information about your assets** including names, addresses, descriptions, account numbers, and type of ownership:
  - » Real estate properties
  - » Businesses
  - » Savings and checking accounts
  - » Personal items
  - » Other assets (stocks, bonds, retirement plans)
  - » Life insurance policies
- **Information about your Beneficiaries, Executor(s), and Guardian(s) of your children** including names, relationship, addresses, and phone numbers.



## Division of Estate

Think about how you want to distribute your property. You can:

- Give a specific item, such as a family heirloom, to a beneficiary
- Give a specific dollar amount or piece of property, such as real estate, to a beneficiary
- Leave a gift to an important cause or charity that you care about
- Divide the remainder of your estate (known as the "residue") between beneficiaries by percentage

Consider leaving a legacy in the form of a percentage of the total worth of your estate, rather than in absolute dollars. That way, the size of each individual bequest remains in proportion to the value of your estate. Donations to registered charities such as Chicanos Por La Causa generate significant tax benefits that can reduce the taxes the donor's estate may owe.

Here are some examples of how others decide to divide their estates:

- Veridiana left a family heirloom to her grandson; a gift of \$10,000 to her favorite charity; and divided the residue of her estate among her children equally.
- Charles left 30% of his estate to each of his three children, and the remaining 10% of his estate to charity.
- Dina divided her estate equally among her three favorite charities.

## Charitable Gift Planning

Here are some questions to think about when leaving a gift to charity:

What causes do you care about?

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What would you change about the world if you could?

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What do you hope to leave as a legacy to future generations?

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As a donor, you choose how CPLC uses your gift. You can designate your gift to the program or **issue you are most passionate about**, or leave a gift **in honor or memory of a friend or family member**.

## How to Write Your Will:

Visit a quality online will-writing service such as [www.freewill.com](http://www.freewill.com) to write a legal will online for free. Services like this will walk you step-by-step through the process; simply answer the questions, print your will, and sign it with your witnesses.

If you have a larger estate, children with special needs, or complex family dynamics, you may choose to work with an attorney. You can still complete your will online to bring to your attorney. Having a draft document can save you time and money when working with an attorney to finalize your will.

If you need help finding an attorney, simply call us at **(602) 257-5519** or email [give@cplc.org](mailto:give@cplc.org).

Here is sample language you or an attorney can include in your will to leave a gift to Chicanos Por La Causa:

### **SPECIFIC BEQUEST**

"I hereby give, devise and bequeath [DOLLAR AMOUNT OR DESCRIPTION OF PROPERTY] to Chicanos Por La Causa, Inc., a nonprofit organization located at 1112 E Buckeye Road, Phoenix, AZ 85034, Federal Tax ID 86-0227210, for Chicanos Por La Causa's general use and purpose."

### **PERCENTAGE BEQUEST**

"I hereby give, devise and bequeath [PERCENTAGE] of my total estate, determined as of the date of my death, to Chicanos Por La Causa, Inc., a nonprofit organization located at 1112 E Buckeye Road, Phoenix, AZ 85034, Federal Tax ID 86-0227210, for Chicanos Por La Causa's general use and purpose."

### **RESIDUAL BEQUEST**

"I hereby give, devise and bequeath to Chicanos Por La Causa, Inc., a nonprofit organization located at 1112 E Buckeye Road, Phoenix, AZ 85034, Federal Tax ID 86-0227210, [ALL OR A PERCENTAGE OF] the rest, residue and remainder of my estate to be used for Chicanos Por La Causa's general use and purpose."

### **CONTINGENT BEQUEST**

If [PRIMARY BENEFICIARY] does not survive me, then I hereby give, devise and bequeath to Chicanos Por La Causa, Inc., a nonprofit organization located at 1112 E Buckeye Road, Phoenix, AZ 85034, Federal Tax ID 86-0227210, [DOLLAR AMOUNT OR DESCRIPTION OF PROPERTY] to be used for Chicanos Por La Causa's general use and purpose."

Thank you for considering  
a gift in your will.

**If you have any questions at all, we're here to help.**

You can call us at:

**(602) 257-5519**

Email us at:

**give@cplc.org**

Or visit us at:

**www.cplc.org/legacy**

Equal Opportunity Employer/Program • Under Titles VI and VII of the Civil Rights Act of 1964 (Title VI & VII), and the Americans with Disabilities Act of 1990 (ADA), Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, and Title II of the Genetic Information Nondiscrimination Act (GINA) of 2008; the Federal government prohibits discrimination in admissions, programs, services, activities, or employment based on race, color, religion, sex, national origin, age, disability, genetics and retaliation. Language assistance and/or auxiliary aids available upon request within each program. Email [compliance@cplc.org](mailto:compliance@cplc.org) with any accommodation requests. Additionally, if believe your rights have been violated, you may contact our compliance department at [compliance@cplc.org](mailto:compliance@cplc.org), 602-257-6708 or anonymously at 1-800-461-9330. Additionally, you may file a complaint directly with the Office of Civil Rights or the Department of Justice. Please contact the compliance department for contact information or to assist you with this process. This process shall protect the substantive rights of interested persons and assure that Chicanos Por La Causa, Inc and its affiliates meet the spirit and guidelines of Federal nondiscrimination authorities.

