



# PLANNED GIVING

## Sylvia Siegel Legacy Circle

Creating Your Legacy With TURN

TURN – The Utility Reform Network



Holding Utilities Accountable

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## Sylvia Siegel Legacy Circle

When Sylvia Siegel sat down at her kitchen table and formed TURN in 1973, she left a lasting gift not only for her children and grandchildren, but for yours as well. TURN continues to build on the foundation Sylvia left, speaking up for everyone who expects to get their money's worth from paying their monthly utility bills.

As long as utility companies put profits and executive bonuses ahead of affordable, safe, reliable service, TURN will be needed to advocate for consumers' rights in California and across the nation.



**SYLVIA SIEGEL  
LEGACY CIRCLE**



## You Are Invited to Join...

Richard Siegel, Sylvia's son, invites you to join him in investing in the future of consumer rights by remembering TURN in your estate plan.

*To honor my mother, and continue her legacy, I'm leaving TURN a lasting gift of consumer protection that will help insure affordability and accountability for the families of the future... Today, more than ever, TURN represents the David in all of us that isn't afraid to stand up and win against corporate Goliaths who take more and more from our communities, while giving less and less.*

— RICHARD SIEGEL, SAN FRANCISCO

TURN believes we can and should live in a society where power, broadband, and phone services are treated as basic rights for all families.



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## Sylvia Siegel Legacy Circle



Donors who give special gifts by remembering TURN in their estate plans are acknowledged with membership in the Sylvia Siegel Legacy Circle.

### We recognize Legacy Circle members in several ways:

- You will be acknowledged in our annual report and other publications
- You will receive preferred seating at TURN events
- You will be invited to our annual Consumer Champion Wine & Cheese Reception with TURN staff and board

You can use many different types of assets for a legacy gift. We encourage you to work with your professional advisors and our staff to help you determine which type of legacy gift is best for you.

Learn about special ways to make your lasting contribution and continue Sylvia's gift for future generations, including gifts through your will or trust, beneficiary designation, and gifts that generate income for you.

## A Bequest: Your Will or Trust

Suggested language for you to consider when making a lasting gift of consumer protection through a bequest to TURN in your Will or Trust:

### Percentage Bequest

Offers flexibility, permitting your gift to appreciate in your will no matter what asset is used.

*"I give, devise and bequeath to TURN, The Utility Reform Network, a nonprofit corporation of the State of California, located at 268 Bush Street, #3933, San Francisco, CA 94104, (Tax ID Number 23-7351081), \_\_\_\_% of my estate."*

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## Specific Bequest

Designates a specific asset or amount as a gift.

*"I give, devise and bequeath to TURN, The Utility Reform Network, a nonprofit corporation of the State of California, located at 268 Bush Street, #3933, San Francisco, CA 94104, (Tax ID Number 23-7351081),*

Choose:

1. *The sum of \$\_\_\_\_\_."*
2. *\_\_\_\_\_ shares of stock in \_\_\_\_\_ Company.", or*
3. *My real property commonly known as \_\_\_\_\_."*

## Residual Bequest

Provides a gift after remembering relatives and friends, usually in combination with a percentage bequest.

*"I give, devise and bequeath to TURN, The Utility Reform Network, a nonprofit corporation of the State of California, located at 268 Bush Street, #3933, San Francisco, CA 94104, (Tax ID Number 23-7351081), all the residue of my estate, including real personal property."*

## Contingent Bequest

Transfers a gift originally planned for a beneficiary.

*"In the event of the death of any of the beneficiaries, I give, devise and bequeath to TURN, The Utility Reform Network, a nonprofit corporation of the State of California, located at 268 Bush Street, #3933, San Francisco, CA 94104, (tax identification number 23-7351081), (percentage, specific, or residual language as above)."*

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## Name TURN as a Beneficiary

The disposition of life insurance policies, qualified retirement plans, and other financial accounts are generally not controlled by your will or living trust. Instead the remaining balance of your accounts or insurance proceeds are distributed to the parties you name as beneficiaries.

Designating TURN as a beneficiary of a life insurance policy, a retirement account, or other financial account is a simple and meaningful way to help ensure a strong future for consumer protection. After your lifetime, these assets will transfer directly to TURN without going through probate.

### **You may name TURN as a beneficiary in your:**

- Retirement plan, such as your IRA, 401(k), or 403(b)
- Life insurance policy
- Bank and brokerage accounts, and other types of deposit and investment accounts, where allowed by state law and offered by your financial institution

Once you decide to designate TURN as a beneficiary, simply provide our address and tax identification number, as follows, on your beneficiary designation form.

TURN, The Utility Reform Network  
268 Bush Street, #3933  
San Francisco, CA 941043  
Tax ID# 23-7351081

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## Give & Receive Lifetime Income

You can make a contribution to TURN and receive income for the rest of your life. Here is a common arrangement:

### Charitable Remainder Trust

You may fund a Charitable Remainder Trust with real estate, stock, cash or a combination of all of these.

**Charitable Remainder Trusts can offer you a number of important benefits:**

- An income tax charitable deduction
- Increased spendable income
- No capital gains tax when appreciated property is transferred to the trust
- Reduction of your taxable estate
- Long term support of TURN

You establish a Charitable Remainder Trust by making an irrevocable contribution of cash, securities, or property to a trust (administered by a trustee of your choice) and designate a person or persons who will receive income (you may be one of them). The income beneficiaries designated receive the income generated by the trust for a term not to exceed twenty years or for life. When the specified time of payments has concluded, the appointed trustee pays the principal to TURN.

## Thank You for Including TURN!

Please contact TURN's Executive Director Mark Toney, Ph.D. directly at [\(510\) 590-2862](tel:5105902862) or [mtoney@turn.org](mailto:mtoney@turn.org) if:

- You would like additional information about naming TURN in a bequest, as a beneficiary, or in a Charitable Remainder Trust.
- You include TURN in your estate plan, so I can thank you personally and welcome you as a member of the Sylvia Siegel Legacy Society.



Thank you for your partnership.

A handwritten signature in black ink that reads "Mark Toney".

Mark Toney  
Executive Director, TURN—The Utility Reform Network

# Creating Your Legacy With TURN



Lower bills. Livable planet.



Holding Utilities Accountable

## CONTACT US

### **TURN – The Utility Reform Network**

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**[TURN.org](http://TURN.org)**

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