



# THE POWER OF YOUR LEGACY

## A GUIDE TO PLANNED GIVING



Planned giving can help to power change for the next generation, helping us to empower more people – not just today, but for generations to come. It allows you to create a lasting legacy while potentially receiving tax benefits when you donate.

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## ABOUT WORLD BICYCLE RELIEF

We believe that mobility is a fundamental human right. Everyone should be able to access education, healthcare, and economic opportunity.

As experts in bicycle design and infrastructure, we create bicycle ecosystems in rural areas that are sustainable, cost-effective, and support families to overcome poverty.

## OUR VISION

A world where people can conquer the challenge of distance, achieve independence, and thrive.



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## THE NEED

Nearly one billion people around the world lack access to reliable transportation. With walking as their primary mode of transportation, distance becomes a challenge — putting education, health services, economic opportunity and other vital goods and services out of reach.

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## OUR RESPONSE

We work with communities around the world to identify how best to overcome these challenges. We provide purpose-designed bicycles - Buffalo Bicycles - to those most in need. Health workers use our bikes to visit patients in their homes, farmers use them to get to market and students use them to reach school. We also create jobs for bike assemblers, train mechanics and establish local shops so that bicycle users have reliable access to maintenance and spare parts.

Working in partnership with communities, development organizations, local and national authorities, and the private sector, we direct at least 70% of programming to support women and girls and enable the people who receive a Buffalo Bicycle to increase their productivity, income and access to education and healthcare.

# YOUR LEGACY CAN EMPOWER A LOCAL ENTREPRENEUR

## MEET MERCY

As one of World Bicycle Relief's Buffalo Bicycle test riders, Mercy plays a crucial role helping World Bicycle Relief's product development team in Kisumu, Kenya, test, refine and improve new bike features.

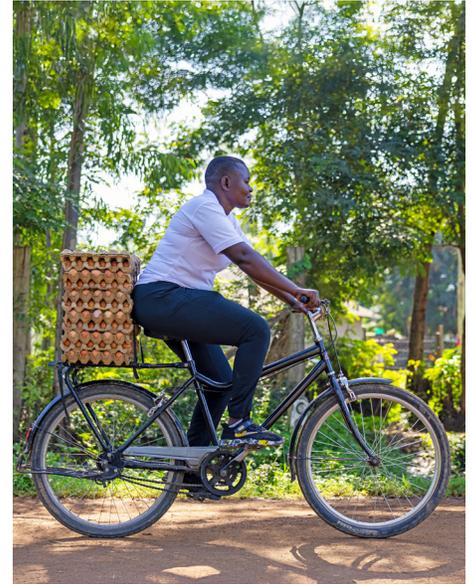
In exchange for her valuable insights, Mercy uses her Buffalo Bicycle to help build her small business selling eggs, while serving her family and her community.

***"I normally take the children to school. And I am also a business lady," says Mercy. "Now, when I am going to distribute my produce, I can use the Buffalo. In only five hours, I've already finished all my work," she says.***

Which means she can also pick up her children from school and continue with her day.

Before the bicycle, Mercy used to carry 2-5 trays of eggs on her head, walking to sell her goods. She'd manage to do this just once a day. Now, she's able to sell 100 trays a week by carrying more goods on her bike and making two trips each day. Her business increased nearly 25%.

***"The Buffalo bike, it means a lot to me," says Mercy. "It has already helped me a lot. If more people have the Buffalo Bicycle, then it helps everyone."***



## FIND THE RIGHT GIFT PLAN FOR YOU

Make a gift now that won't affect your day-to-day cash flow during your lifetime.

## GIFTS FROM YOUR WILL OR TRUST

By having a valid and up-to-date Will in place, you can ensure that your loved ones are provided for, as well as helping charitable causes close to your heart. A gift in your will (or sometimes known as a legacy) is a way of giving a gift to family, friends and organizations you care about after you die.

Anyone can leave a gift in their Will. Even leaving 1% of your estate to WBR can have a huge impact.

## HOW TO LEAVE A GIFT IN YOUR WILL

After caring for family and friends, including a gift in your Will to World Bicycle Relief, is an incredible way to support us.

### THERE ARE TWO MAIN WAYS TO LEAVE A GIFT TO WBR IN YOUR WILL



#### PECUNIARY GIFT

A pecuniary gift is a financial donation of a fixed amount. However, because of inflation, these are liable to depreciate during the course of your lifetime. That's why many of our supporters prefer to leave a residuary gift.



#### RESIDUARY GIFT

A residuary gift is all or part of what's left of your estate once your other wishes have been carried out.

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## WHO SHOULD WRITE MY WILL?

You should contact a legal professional or a professional will writing service, such as [freewill.com](http://freewill.com). This helps to ensure your Will is legally correct and that your wishes are carried out.

We always encourage you to give a gift without restricting its usage, because we don't know where our focus will be most needed when we receive your gift. Unrestricted gifts allow us to allocate our gift to the area of greatest need.

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## HOW TO NAME WBR IN YOUR WILL

**Registered Name:** World Bicycle Relief NFP

**Registered Office:** World Bicycle Relief NFP: 1000 W. Fulton Market, 4th Floor, Chicago, IL 60607

**Charity EIN:** 20-5080679

This sample language may be useful:

"I give and bequeath to World Bicycle Relief NFP, 1000 W. Fulton Market, 4th Floor, Chicago, IL 60607 [the sum of \_\_\_\_\_ Dollars (\$\_\_\_\_)] [ \_\_\_\_\_ % of the rest, residue and remainder of my estate], to be used for its general charitable purposes."

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## WHAT IF I ALREADY HAVE A WILL?

Your executor can easily update your wishes by adding a codicil (a document with an amendment) to your Will.

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## TELL US ABOUT YOUR GIFT

We encourage you to let us know that you have left us a gift in your Will so we can thank you. Knowing about your gift helps us plan for the long-term future of WBR and enables us to thank you properly and keep you updated about our work. Telling us is not legally binding, and we do not ask you to disclose any financial information.

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## WHAT HAPPENS IF I CHANGE MY MIND?

You are free to change your mind about leaving a gift in your Will to WBR at any time, and we completely understand that this is a personal decision. If you have told us you intend to leave us a gift, it would be helpful to let us know if that changes.

## PUBLICLY TRADED SECURITIES

### HOW IT WORKS

You transfer appreciated stocks, bonds, or mutual fund shares you have owned for more than one year to World Bicycle Relief.

World Bicycle Relief sells your securities and uses the proceeds for our programs.

### BENEFITS

- You receive an immediate income tax deduction for the fair market value of the securities on the date of transfer (even if you originally paid much less for them).
- Giving appreciated stock can be more beneficial than giving cash. The "cost" of your gift is often less than the deduction you gain by making it.
- You pay no capital gains tax on the transfer when the stock is sold.

## DONOR ADVISED FUNDS

A Donor-Advised Fund, or DAF, is an investment account that is used for charitable giving. It allows individuals, families or organizations to make charitable contributions and recommend grants to their preferred charities over time.

A donor-advised fund can provide you with immediate tax benefits while making your charitable giving easier for years to come.

### ADVANTAGES OF A DONOR-ADVISED FUND:

**Simplicity:** the donor-advised fund sponsor handles all record-keeping, disbursements, and tax receipts.

**Flexibility:** timing of your tax deduction can be separate from your charitable decision-making.

**Tax-efficiency:** contributions are tax-deductible, and any investment growth in the DAF is tax-free. It is also easy to donate long-term appreciated securities, eliminating capital gains taxes.

**Family legacy:** a DAF is a powerful way to build or continue a tradition of family philanthropy.

**No transaction fees:** once approved, 100% of your recommended grant goes to World Bicycle Relief.

## RETIREMENT PLANS

A gift of your retirement assets, such as an employee retirement plan, IRA, or tax-sheltered annuity, is an excellent way to make a gift. A gift of these assets can shield your heirs from taxes while funding PPFA's future.

Are you 70 1/2 or older? By making a gift directly from your IRA to WBR, you can satisfy your required minimum distribution (RMD) while avoiding the income tax normally incurred by RMDs.

### BENEFITS

- Continue to take regular lifetime withdrawals.
- Your heirs avoid the potential double taxation on the assets left in your retirement account.
- Maintain flexibility to change beneficiaries if your family's needs change during your lifetime.

Letting us know about your planned gift is a wonderful way to share your generosity and help us plan for the future. It's simple: just let us know the type of gift, its estimated value, and any special wishes you have.

By notifying nonprofits of their planned gifts, donors enable organizations to acknowledge their generosity, express gratitude, and involve them in legacy societies or recognition programs. By keeping us informed, you help us honor your wishes and build a stronger relationship together.

## CONTACT US

World World Bicycle Relief NFP: 1000 W. Fulton Market, 4th Floor, Chicago, IL 60607

<https://worldbicyclerelief.org>

[info@worldbicyclerelief.org](mailto:info@worldbicyclerelief.org)

Charity EIN: 20-5080679

