



PLAN A BEQUEST ESTABLISH YOUR LEGACY AT INDEPENDENT

The Independent Institute recognizes and honors the many benefactors who have made enduring gifts by including Independent in their financial or estate planning.

WHY MAKE A BEQUEST TO INDEPENDENT INSTITUTE?

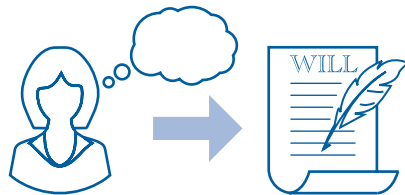
To ensure that the principles you value endure for future generations, your legacy gift will carry the torch for human freedom and dignity, allowing your family and future generations the opportunity to flourish as you have.

HOW IT WORKS

There are several ways that you can make a lasting and significant gift to Independent and the future of liberty and free societies.

INCLUDE INDEPENDENT INSTITUTE IN YOUR TRUST DOCUMENTS

You may simply designate the Independent Institute as a charitable beneficiary in your will or retirement plan. Any assets accordingly distributed to Independent are exempt from estate tax. You can leave a bequest to the Independent Institute by adding to an existing will or drafting a new one. You can also make a future gift of retirement-plan assets by designating Independent as the beneficiary of your plan.



“I believe the coming years are going to be pivotal for protecting our freedoms, especially for coming generations.”

– DAVID J. THEROUX (1949-2022)
Founder, Independent Institute

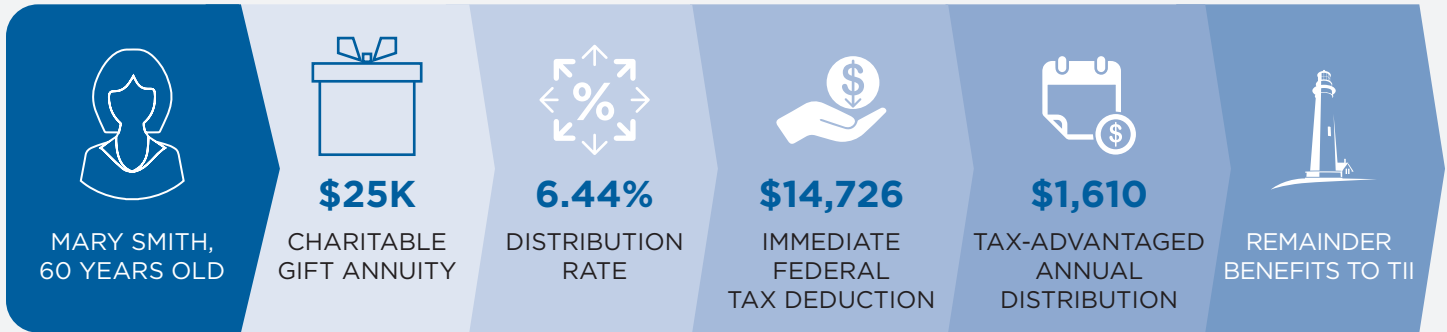
To join the Safe Harbor Legacy Society and inform us about your existing gift provision for Independent, or get answers to your estate and gift planning questions, please contact:

Gisselle J. Augustine
Development Manager
(510) 632-1366 ext. 149
leavealegacy@independent.org

CREATE A LEGACY INCOME TRUST WITH INDEPENDENT INSTITUTE

Our Legacy Income Trust fund provides an immediate tax deduction, plus tax-advantaged income for your lifetime (with the option to add income for the life of a designated survivor). Please contact us for a customized illustration based on your age, tax bracket, and the amount being considered as a legacy gift.*

SAMPLE LEGACY INCOME TRUST BENEFITS FOR A 60-YEAR OLD PERSON:*



WHAT OTHER LEGACY MEMBERS ARE SAYING...

“Independent Institute’s causes and efforts, such as limited government, Constitutional liberties, and economic freedom, will last past my own lifetime. That’s why I want to support Independent’s work looking forward by designating a portion of my retirement plan and IRA to the Safe Harbor Legacy Society. And I trust the Institute to continue fulfilling its mission into the future.”



—JANE LOUISE JOHNSON

“The Independent Institute provides a stellar ‘beacon of light’— to use its own appropriate logo—that helps navigate us through a sea of misinformation, shallow research, political messaging on a broad set of topics vital to being a well-informed citizen. The Independent Institute, through its publications, conferences, and personal engagement, is a very important source for us of knowledge and inspiration to actively advance ideas that promote personal and societal freedom.”



—TERRY AND CAROLYN GANNON