



Lubee Bat Conservancy

Saving Bats

Conserving Ecosystems

Inspiring Stewardship

Lubee Bat Conservancy Planned Giving & Legacy Gifts

Create a Lasting Legacy for Bats and Conservation

Planned giving, sometimes called legacy giving or estate giving, is a meaningful way to ensure that your values continue to have an impact well into the future. For Lubee Bat Conservancy, planned gifts provide lasting stability that allows us to care for our bats, support conservation programs, and educate future generations.

Many supporters are surprised to learn that planned gifts may eventually represent one of the most significant sources of funding for mission-driven organizations like Lubee Bat Conservancy. Even more importantly, planned giving allows donors of all backgrounds to make a lasting difference.

Why Consider Planned Giving to Lubee?

Leave a Conservation Legacy

Including Lubee Bat Conservancy in your estate plans allows you to create a legacy that reflects your passion for wildlife, conservation, and education. Planned gifts can help ensure the long-term care of bats, support education and awareness initiatives, and protect conservation programs for decades to come.

Potential Tax Benefits

Depending on the type of gift you choose, planned giving may offer financial benefits such as:

- Income tax deductions
- Avoidance or reduction of capital gains taxes
- Tax-free charitable distributions from IRAs (Qualified Charitable Distributions for donors age 70½ and older)

We encourage you to consult with your attorney, financial advisor, or tax professional to determine what option is best for your individual circumstances. While we are happy to provide information about giving options, Lubee Bat Conservancy does not offer legal, tax, or financial advice.

Direct Your Impact

While unrestricted gifts provide the greatest flexibility and impact for Lubee's mission, some supporters wish to direct their planned gifts toward specific priorities such as:

- Bat care and welfare
- Conservation projects
- Education and awareness programs
- Facility improvements and long-term sustainability

Planned giving allows you to express those priorities clearly within your estate documents.

How Planned Giving Strengthens Lubee's Future

Knowing that Lubee Bat Conservancy is included in supporters' estate plans allows us to plan responsibly and confidently for the years ahead. Legacy gifts help provide:

- Financial stability during uncertain times
- Flexibility to pursue enduring conservation goals
- Security for animal care and mission-critical programs

This forward-looking support helps ensure consistent care for bats living at Lubee today while allowing us to respond thoughtfully to future conservation and education needs.

Common Types of Planned Gifts

- Planned gifts can take many forms, including:
- Bequests through a will or trust
- Beneficiary designations on retirement accounts or life insurance policies
- Gifts of appreciated assets such as securities or real estate
- Qualified Charitable Distributions (QCDs) from IRAs

Your professional advisor can help determine which option aligns best with your personal and financial goals.

Best Practices for Estate Planning

When making estate plans that include a charitable gift, we encourage supporters to:

1. Inform your executor or trustee of your plans and confirm they are willing to serve in that role.
2. Let Lubee Bat Conservancy know of your intentions, especially if your gift involves property or specific restrictions.
3. Ensure that important documents, digital accounts, and access information are organized and accessible.

Sharing your plans allows us to better steward your future gift and honor your intentions.

What Do You Want to Be Remembered For?

Planned giving is not only about finances, it is about values. By including Lube Bat Conservancy in your estate planning, you are helping ensure a future where bats are protected, ecosystems are healthier, and conservation education continues to inspire. If you are considering a legacy gift, we would be honored to speak with you confidentially. There is no obligation, and all conversations are handled with respect and care.

To learn more or to notify us of a planned gift, please contact:

Brian Pope, bpope@lube.org, 352-485-1250

Thank you for considering a gift that lasts beyond a lifetime.