



Planned Giving Guide

As someone who loves NESEA, you have the power to leave a lasting legacy in support of a built environment in the Northeast that is climate neutral, adaptive and resilient, energy independent, architecturally inspiring, and supportive of connection and community— today, tomorrow, and beyond. No matter your means or stage in life, by including NESEA in your plans, you help sustain our mission to advance the adoption of sustainable energy practices in the built environment by cultivating a community where practitioners share, collaborate and learn and carry it forward for years to come.

Start a Conversation

To start a conversation about making a planned gift to NESEA, please contact Interim Executive Director Florence MacGregor at fmacgregor@nesea.org or (414) 774-6051 ext. 14. Everyone has a different set of circumstances and different goals in planning their legacy, and there are many options available for planned giving.

Longtime NESEA Member Bruce Coldham is the among the first people to make a commitment to our planned giving campaign, which has a goal of securing \$5 million in commitments to the endowment fund by NESEA's 50th birthday in 2025.

The Endowment Fund

Unless otherwise specified, all planned gifts support NESEA's Endowment Fund, which is designed to provide lasting support for program development that supports NESEA's vision, especially for programs that otherwise would not have funding. Examples of how it could be used might include establishing strategic scholarships, building new partnerships, and welcoming internationally renowned speakers to our conferences. The Board of Directors has established a policy by which only a portion of the dividends may be used in a given year with the intention of securing the Endowment Fund in perpetuity as a sustainable financial asset for the organization. The Fund is managed by JPS Global Investments, and the account is focused on a stock of green companies judged by the advisor to have a net positive effect on the environment.

Learn more at nesea.org/planned-giving



FIRST NAME

MIDDLE NAME

LAST NAME

ADDRESS

CITY

STATE

EMAIL

PHONE

Please recognize our gift as from the name indicated below

I/we wish to remain anonymous

I/we have another preference indicated below:

Note: We will not make your gift amount public with prior consent.

Bequest

Life insurance policy

Retirement plan beneficiary

Stock gift

Other: A specific amount

A specific asset

A percentage of the residuary of my estate, trust, or retirement plan

Please indicate the amount, asset, or percentage of the gift indicated above. All information provided will be kept in the strictest confidence and will be used for internal planning purposes only. We understand that you may need to use an estimate rather than an exact amount.

Requested use of this planned gift:

Unrestricted gift to provide maximum flexibility for NESEA to use for greatest need

A gift to be used for this specific purpose:

Completion of this form is not intended to be legally binding, but rather as a notification of intent. Please discuss your planned giving intentions with your professional financial advisor. NESEA is a tax-exempt nonprofit organization recognized by section 501(c)(3) of the Internal Revenue Code. Tax ID #23-7437161. Contributions are deductible as allowed by law.