

Leave A Legacy

Making A Difference In The Lives That Follow

Last March, 15 Martin County students proudly climbed the steps to the Blake Library stage to accept an award in honor of their achievement in the Martin County Character Counts program. Though the audience was filled with proud parents, family and friends, the one man who was most instrumental in making the awards happen was missing.

It wasn't that Joe Kordick, founding chairman of Character Counts, a program of United Way, didn't want to be there. He couldn't. Joe Kordick had passed away suddenly the previous year but, thanks to proper planning via his will, Kordick's spirit was very much present as each of the 15 students was honored with a Joe Kordick Youth Character Award.

That ability to continue giving, teaching and participating in helping others, even after death is an idea which organizers of the local Leave a Legacy® organization, a program of the Treasure Coast Planned Giving Council (TCPGC), believe is long overdue. And, this year, they're spreading the word all along the Treasure Coast about the importance of remembering a local charitable organization in a will or family foundation.



The second annual Leave A Legacy Award was presented to Phyllis Kordick to posthumously honor her husband, Joseph Kordick, during the National Philanthropy Day ceremonies in November 2002. The annual award honors gifts made by bequests or in trust.

According to Leave a Legacy, research shows that while 74 percent of Americans make regular charitable contributions, fewer than 6 percent make charitable bequests. And, they add that the ability to leave a legacy is not just for the wealthy. "Anyone can leave a legacy in their will even if it's only \$100," said James Campo, president of the TCPGC and owner of Campo Insurance and Investments in Stuart.

Though the tax advantages of remembering a charity in a will can be significant, organizers say that one of the most significant reasons an individual would want to establish a legacy is for the message it sends to your heirs and the rest of the community.

"Ethical wills are a statement of passing on those things that you believe are important to you and that you hope that you will shape the continuity of the things you find important," said April Hicks, a partner with Stuart-based accounting firm Proctor, Crook and Crowder and immediate past president of the TCPGC. And, she adds, it can be different for everyone.

As part of the Leave a Legacy speakers' bureau, Hicks conducts workshops which guide participants through the process of composing an ethical will. And, while the creation of an ethical will can eventually help identify the types of charities or organizations you'd like to support, ethical wills really don't have anything to do with money.

Hicks explains that ethical wills bequeath values, ideas and personal reflections to family members and loved ones. And, she adds that it's never too soon to compose an ethical will. "People of all ages can benefit from preparing an ethical will because it helps identify what you want to do with your money and what you do with your life," said Hicks.

As a community education effort, Leave a Legacy does not solicit gifts, but rather their 60-plus rapidly growing membership of nonprofit organizations, estate planning professionals, corporate funders and media outlets is focusing on urging clients, donors and members to make a will, make a difference and leave a legacy.

Top 5 Things You Can Do Today

1. Meet with an estate planning attorney to prepare a trust or a will and include a gift for the charities that have made a difference in your life or the life of someone you love.
2. Donate a specific dollar amount or a percentage of your assets, including stocks, bonds, CDs, real estate, vehicles, art, jewelry and other personal property.
3. Name your favorite charity as the beneficiary of your IRA or pension plan.
4. Name your favorite charity as the beneficiary of an existing life insurance policy, or purchase a new policy and name the charity as the beneficiary.
5. Honor deserving friends and remember loved ones with memorial gifts.