

Planned Giving

LEAVE A LEGACY OF EMPOWERMENT.



Planned giving – including a gift to Trickle Up in your estate plan – costs nothing during your lifetime and makes a significant difference to Trickle Up’s future growth and stability and to the lives of the women we partner with to forge resilient pathways out of poverty.

Regardless of your age, income, financial or marital status, it is wise to have an up-to-date estate plan in place. Estate planning provides an opportunity to support causes you may not have had the chance to, or those you know and love, at a different level. You are free to change your beneficiaries at any time.

Planned gifts are also a critical component to philanthropy. They can play a large role in helping organizations like Trickle Up achieve our mission and grow our impact. They can also provide significant tax benefits to you, the donor.

I love knowing that my planned gift to Trickle Up will go to support vital, lasting, effective work for women and families that transforms lives and breaks the cycle of poverty sustainably.

Rhonda Zapatka, Trickle Up donor

Make a Gift

While there are many ways to make a planned gift, a charitable bequest (made through a will or a living trust) is the most common. Bequests are most often designated as percentages of estates or dollars amounts.

To make a request, contact your attorney, financial advisor or an estate planning specialist and let them know that you would like to leave a gift. They will ask for our legal name *Trickle Up Program, Inc.*, Tax I.D. Number *06-1043042* and mailing address *Trickle Up, 31 West 34th Street, Suite 7001, New York, NY 10001*. **Please note that Trickle Up staff are not able to advise on estate planning. This must be handled through your own attorney, advisor, or specialist.**

Planned gifts may also be made through beneficiary designations in life insurance policies, retirement plans, IRAs, 401(k)s and [DAFs](#). Most of these can be created by completing a beneficiary form provided by your plan administrator.

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Some people want to live forever. I think I have found a way – leaving an estate gift to support the amazing work Trickle Up does to alleviate extreme poverty. It focuses on women and works largely in emerging markets – two areas I have been committed to for all of my adult life. Seeing that good work continue is the best legacy I can think of.

Penny Foley, Board Chair, Trickle Up

Reach Out

Contact your attorney, advisor or specialist to discuss your philanthropic goals and ask about estate planning and relevant financial benefits. Contact Elena Szajewski at eszajewski@trickleup.org if you are interested in adding Trickle Up to your estate plan, or have already done so, so that we can add you to our Legacy Society and thank you for your generosity.

I could leave all of my estate to relatives who don't really need it, or with a part of my estate, help reduce suffering for those who really do. For me, it's not a hard choice.

Peter Wolf, Trickle Up donor

Join the Legacy Society

We appreciate every member of the Trickle Up Legacy Society and the significant difference they make. All members are offered the opportunity to be listed in our annual report and receive updates on our progress. The Legacy Society is a chance to be a pivotal force for change by helping millions forge resilient pathways out of poverty. Join us today.



I give to Trickle Up because effective interventions in the Global South benefit far more people than rich world ones, and Trickle Up's seem effective.

Arnon Rosenthal, Ph.D., Trickle Up donor