

PARTNERS

PARTNERS FOR THE FUTURE

SPRING 2007



Volunteer Continues Support Through Gift Annuity

As a student in Texas in the 1950s, Katrina Meredith felt the impact of the Civil Rights Movement. "I witnessed the deep prejudices that shaped peoples' thinking and actions [in response to the Movement]," she explains. Later, as a teacher, she participated in the Houston Independent School District's "voluntary desegregation" plan and emerged an active supporter of civil rights.

During those years, Katrina discovered the Center. Her admiration of its early successes, including a case that transformed the Alabama State Troopers from an all-white to a racially diverse police force, inspired Katrina to join SPLC's monthly giving program. Marking her 30-year partnership with SPLC, Katrina set up a charitable gift annuity in 2006.

"SPLC has consistently taken courses of action that have had sustainable positive impacts on protection of civil rights for minorities, education on the value of diversity, and legal action against hate groups," Katrina notes.

Katrina's commitment to social justice is rooted in the strong values of her mother, who encouraged Katrina to do volunteer work with people less fortunate. "A summer I spent volunteering in a migrant workers' camp had a huge impact on my awareness of the social inequities that exist in our bountiful country, and the vulnerability of those for whom that bounty is out of reach. That led me to participate in the United Farm Workers'

boycott movement in the 1970s."

Katrina has continued to make extraordinary life choices fueled by her vision of justice. She retired in 2005 and joined an international volunteer service organization in Southeast Europe. "I have the benefit of my life experiences and skills to bring to my service now; I am much better equipped to deal with the challenges," she explains. "I'm renewing the activism that took a backseat while raising a family and having a career."

Her retirement also led to Katrina's charitable gift annuity. "A gift annuity was more in line with my fixed income status than a monthly pledge. SPLC provided good information on the benefits and it was easy to accomplish."

Of her current volunteer experience, Katrina says: "In my location, I am not experiencing the extreme physical discomfort that some international volunteers endure; my challenges are more in the area of changing mind sets. My experiences here reinforce the value of the work of the Center. Here, law is tenuous and diversity often gets lip service at best. A long history of oppression and violence dominates, although huge efforts by international groups assist those moving away from that history toward a more open and diverse future.

"As we work to change the inhumane values that are pervasive in transitional societies — and that still exist in America — SPLC will continue to have my support."



Katrina Meredith reinforced her commitment to social justice by joining Partners for the Future.

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New Partners

We are pleased to recognize our newest Partners for the Future who have included the Center in their estate plans.

Lynn Ashe
Valerie M. Bailey
Lonny & Alane Baker
Melanie & John Balzer
Karen Banks
Dorothy L. Benavides
Anne L. Berger
James M. Berger
George & Helen Bickley
Steven C. Bilow
Othelia W. Boger
Glenn E. Bourque
Allen Bradford
Myke Branch
Rob & Carol Branch
Dr. Irvin B. Braverman
Carolyn Brennan
Roz & Sam Brott
Angela Kristin Brown
Larry L. Bucher
Kris A. Bushley
Roni Byrne
Robert Carlson
Jim Carlstedt
Carl E. Chadek
Wendy M. Clark
Lisa Clay
Margaret E. Connelly
Steve & Laura Connolly
Patrick M. Copeland-
Malone
Jaynie L. Cordes
Nancy Corlis
Ann M. Corrigan
Noreen Costelloe
Tia Cross
Dr. Stephen Davidson
Sandra R. Diener
Linda Dillon
Margaret J. Dobrinska
Charles & Vivian
DuBois
Joanne Hall Dufilho
Patricia J. Duke
Mary Jean Egglefield
Edwin L. Ficken
Lee C. Fischer
Kathy Foster
Dina Fox
Adele Franson
James M. Freeman II
Joel Gaalswyk
Mr. & Mrs. Joseph
Gamboa

Pamela Gaynor
Nancy Lee & Douglas
Geisler
Martin & Bodil Gerotwol
Linda Gerson
Hazel J. Gordon
Nell Greenfield
Ruth Greller
Lynn D. Gresser
Rev. Gerald E. Grimm
Lillian Grimm
Linda Groves Williams
Charles & Grace
Guggenheim
Mark Haas
Dr. Marylen E. Harmon
Mary Lee Harris
Willis D. & Carolyn A.
Hawley
Wilma Hayes
Lisa C. Hedgepeth
Rebecca Helm
Graham Herrick
John A. Hill
Leslie Johns-Hill
Dr. Louise T. Hollowell
Linda Horne
Gina R. Horowitz
Bruce Hurter
Madeleine Entel
Jenny L. Imhoff
Carl A. & Carol L.
Ingram
Gabriel Isakson
Jerry L. Iverson
Robert A. Jackson
David F. Jaffe, M.D.
Gary S. & Grace
Johnson
Ben Jones
Roanna Judelson
Geoffrey Kansas
Carolyn Katz-Major
Grace Kelly
Clarence L. & Carol
J. Kent
Harry Kiamopoulos
Penelope Kingman
Byron H. Knight
Jay & Susan Koester
Glennnda M. Kouts
Billie & Boris Kozolchyk
Helen K. Kranz
Barbara Kraus

Victor F. LaPuma
Richard Lane
Dr. Emma J. Lappat
Mary Jane Leone
Dennis M. Harrison &
Karen Litton
James Litwin
Annette O'Leary
Lohman
Barbara Luksch
Maria MacLean
Traven P. Macaulay
Lisa Macchia
Dorothy Mackay
Lynne M. Mackey
Takako Maeda
Megan Mangum
James M. & Linda E.
Mayfield
Marcelle McDaniel
Christopher S. Mee
Mary Ann Merendino
Ann Meyers
Louis Milgrom
Barbara Worsinger

Mrs. Richard Miller
Dr. Clifford E. Minton
Alma H. Minton
Michael M. Mitchell
Carol Morris-Coronis
Marcia Moses
Bruce & Dorothy
Mosher
William A. Moyer
Sharon L. Mueller
Arthur Amos &
Nathalie Musson
Pauline Nutt
Dorothy C. Oakbrae
Sarah W. Oelberg
Charles H. & Marilyn A.
Paesch
Paul Katz & Sarah Pallas
Leon & Mildred Parker
Margaret Parker
Laurel Paster
Dr. Marcia Perry
Mary S. Ply
Glen E. & Susan F.
Rainsley

Melba T. Ramos
Daniel B. & Shirley
Rapoport
Gabor Bethlendy
Rebecca Rauscher-
Bethlendy
Tamar C. Read
Lynn A. Reiman
Hillard N. Reiser
Lucille Repka
Charles & Evelyn Riggs
Carl & Margaret Rigney
Laurie J. Rivet
Joan Robey
Jeanmarie Robinson
Jacquie Rodgers
Dr. Eleanor G. Rogan
Dallas Roper
Allen Rose
Evelyn Rosenberg
Lawrence R. & Barbara
F. Rosenberg
Gerald F. Ross
E. A. Ruff
Cheyrl A. Russell

Rosalia Salinas
Ruth A. Salinger
Arnold A. Saltzman
Bertha B. Sanders
Dr. Diane H. Schetky
Carol P. Schnitzler
Bethlendy
Bruce L. Schuchert
Lynn Seuffert
Robert Lewis Shayon
Karen Snapp
Jack D. Sohl
Dr. Bruce Stein
Dr. Christy Chuang-
Stein
Margaret E. Stewart
Richard Sullivan
Joan Tarachow
Douglas R. Thompson
Joseph Towle
Micki Turner
Howie Vactor
Robin E. Velte
Roman & Alice
Verostko
Landon & Virginia Viles

Mr. & Mrs. Richard
Voltin
Norman O.
Wagenschein
Frank David Waller
Rebecca M. Weis
Dr. Jean Wellisch
Edward Weston
Nancy Weston
Ginia D. Wexler
Frank A. White
Nancy Whitworth
Therese Wiedmann
Marjean Willett
Helene Willis
Kathy Winn
Olivette Wooldridge
Kiwana K. Wyatt
Deborah S. Wyle
Gretchen L. Young
Ronald C. Young
Michele Zarro
Linda D. Zwiren

Comments

My husband and I have met with our estate attorney and are including SPLC in our estate plans. Your work is of utmost importance to maintaining a free society. C. I. California

SPLC is the most worthy organization I know of — you put the Klan out of business. SPLC was my first choice for a charitable gift annuity. V.V. Florida

Thanks for the information and prompt response. It is our pleasure to be able to name the Center under our trust, as the work it does is vital to maintaining the values upon which this country was founded. P. and J. P. California

What I have wanted to do, and have finally accomplished, is to name the Southern Poverty Law Center as a beneficiary to one of our TIAA-CREF annuity accounts. Thank you for all the impressive work going on by so many good people at SPLC. I stand in awe of the dedication and persistence and am proud to support your programs fully. M. P. North Carolina

I like to read about the continued great work of the SPLC. You see, I came to the U.S. in 1938 as a refugee from Hitler-dominated Austria and have always felt deeply grateful to our country for giving me a new life in freedom and dignity. And this is one of the reasons I am happy to contribute in some way to your invaluable work in fighting for justice and tolerance. Now, having become 97 years old, I have decided to bequeath to the Center the amount that will be left in my mutual fund at the time of my death. Best wishes for continued success in your work. T. W. New York

I have for years followed the work of the Center. I have arranged for a portion of my retirement savings to go to the Center if I should die before I begin to withdraw funds. I also intend to include the Center in my Will. Thank you from the bottom of my heart for the work of the Center. M. R. Florida

Visit us on the Web!

For planned giving
information, the latest
Center news or to
make a donation, go to

[www.splcenter.org/
partner](http://www.splcenter.org/partner)

Noble Be Man

This month, Jews worldwide will observe Yom HaShoah, Holocaust Remembrance Day. The Hebrew word “Shoah” is used to describe the devastating inferno that swept up six million Jewish souls from Nazi death camps.

Sixty years after the Holocaust’s end, a new whirlwind is emerging.

The Center’s Intelligence Project has exposed an extensive network of rabidly anti-Semitic “churches.” Called “radical traditionalist Catholicism,” this movement is anything but Catholic; it is instead a perversion of that faith.

In a recent speech, movement leader Brother Anthony Mary declared that “the perpetual enemy of Christ is the Jewish nation” and went on to say Jews aim to “destroy all Christian nations.” He concluded with a chilling statement — “Jews are the synagogue of Satan,” a phrase that is also part of the official ideology of the neo-Nazi Aryan Nations.

Brother Anthony Mary’s movement is perhaps the largest anti-Semitic force in the United States today, with at least 100,000 followers and tens of millions of dollars in assets.

Yom HaShoah reminds us of our obligation to combat this growing firestorm of anti-Semitism and bigotry.

This month, the Center’s Teaching Tolerance program is asking 50,000 educators to use its free Holocaust education kit, *One Survivor Remembers*, in their classrooms. Based on the life of Holocaust survivor Gerda Weissmann Klein, *One Survivor Remembers* includes an Academy Award®-winning film, artifacts drawn from Gerda’s personal collection and an array of lesson plans.

Wrenched from her home in Bielitz (Bielsko), Poland, at age 15, Gerda was sent to a Nazi labor camp and later forced to

march from Germany to Czechoslovakia. Less than 200 women of the thousands who began that gruesome journey lived to see their rescuers — the 5th American Infantry Division.

By the end of the war, Gerda had lost her parents, brother, home, possessions, and community; even the dear friends she made in the labor camps and along the march, with whom she had shared so many hardships, were dead.

The Nazis had taken all but her life.

And yet, on the day of her liberation, as Gerda stared into the eyes of her rescuer — the man she would later marry — she uttered not words of rage or resentment, but verse from the poet Goethe, “Noble be man, merciful and good.”

As flames of anti-Semitism ignite again, the humble words Gerda spoke decades ago remind us that we must be steadfast in our efforts to nurture respect for differences over hatred of them. This is but one of the many reasons I have made a provision for the Center in my estate plans. As a Partner for the Future, I help ensure that this noble struggle will continue for as long as it takes, even after I am gone.



Mark Deen

Consider a Charitable Gift to the Center i

Every gift you make to the Center makes a difference in the lives of others. You help fund legal efforts on behalf of the most vulnerable among us. You help educate our nation's schoolchildren on the dangers of bigotry and extremism. You bring us a step closer to realizing our vision of a future free of hatred and intolerance.

Though some may say that future is a long way off, we must never quit the journey. You can continue your commitment to our shared vision of tolerance by

joining the special group of donors who make up Partners for the Future. By including the Center in their Wills or estate plans, our Partners help safeguard the Center's long-term mission, while providing a legacy for loved ones and peace of mind for themselves.

Whether you think of yourself as rich or poor, or somewhere in between, your planned gift will make a difference. Even a small bequest in your Will can have a big impact when combined with gifts from other caring individuals like Katrina Meredith (see page 1).

You don't have to choose between leaving a gift to your family or your favorite charity. You can do both, and some charitable gifts may actually save your family money by decreasing the amount they pay on their inheritance taxes.

Importance of a Will

- Make sure you have an up-to-date Will (or living trust) that reflects your charitable objectives. Without these documents, you surrender control of your property and assets to the courts with no consideration to personal relationships or the differing needs and lifestyles of family and loved ones.
- Although there are many methods of arranging for the orderly transfer of property at death, a valid Will ensures that nothing is overlooked.

UPDATE YOUR WILL REGULARLY

You are to be commended if you already have a Will. However, it is important to review your Will every three to five years, especially if there have been significant changes in your life, such as:

- Change in marital status — If you have been recently married, widowed, or divorced.
- Birth of a child or grandchild — You may want to change an existing bequest.
- Children reaching adulthood — Provisions you made for them when they were young may need to be revised.
- Move to another state — Probate and estate laws differ significantly from state to state. Consult an attorney in your new state of residence.
- Changes in the value or type of assets in your estate — You may have left to a loved one an asset that you no longer own.
- Personal representative named in your Will may no longer be able to serve.
- New or revised state or federal laws regarding estate planning and taxes may affect the efficiency and validity of your Will.
- Change in charitable interests or goals — Be sure your philanthropic intentions are carried out and that organizations you support are remembered after your death.

When you review your Will, consider adding a charitable bequest to the Center. We will be happy to send sample wording to assist your attorney.

n Your Will

- After providing for family members and friends, you can use your Will to continue your support of causes that are important to you, such as the Center and its programs.

Contact your financial advisor (a financial planner, lawyer or accountant) and ask for advice about which charitable gift best meets your goals, and please consider making the Center a beneficiary. If you return the enclosed envelope and request information about Wills, we will send you a free booklet, *Giving Through Your Will*. It includes information that will help you think through the process and gather information for your attorney.

Your Will Reflects Your Values

Your Will says something about you. It says that you care about your loved ones and want to protect them by taking care of legal matters relating to the transfer of the property in your estate.

Additionally, your Will provides insight into your lifetime involve-

ments and concerns. Bequests to family members speak of your love; bequests to organizations speak volumes about your values.

For example, when you include the Center in your Will, you reveal the importance that philanthropy played in your life, and you leave a legacy for future generations for a cause in which you deeply believe. Such action has a ripple effect — it encourages those you leave behind to consider their own values and legacies.

Other Planned Gifts

Other gift planning opportunities include charitable gift annuities, charitable remainder trusts, and gifts through life insurance and retirement plans. All of these provide a way of planning for the Center's future along with your own.

If you have already provided for the Center's future in your Will or estate plan, please let us know. We want to express our gratitude to you and welcome you as our newest Partner for the Future.

WILLS AND BEQUESTS

When including the Southern Poverty Law Center in your Will, you can choose one or more of the following types of bequests:

Residual or percentage bequest

gives the residue, or a portion (usually a percentage) of the residue, of your estate to the Center after specific bequests have been made;

Specific or general bequest

leaves a stated amount of cash, securities, and/or other property to the Center;

Contingent bequest

provides an alternative beneficiary, such as the Center, if one or more of your bequests cannot be fulfilled;

Life-income bequest

provides a life income to someone close to you with the principal passing to the Center after his/her lifetime;

Combination bequest

combines several of the types of gifts listed above.

Whether you are preparing a Will for the first time or wish to make a change to your existing Will, we strongly suggest that you consult your attorney.

planned
giving
Questions?

It's easy to
contact us:

- 1 Call Linda Stringer or Pat Thornton
toll free at 1-888-414-7752
- 2 E-mail us at
plannedgiving@splcenter.org
- 3 Return the enclosed envelope
- 4 Write us at: 400 Washington Ave.
Montgomery, Alabama 36104

Give Appreciated Securities and Receive Income For Life

BECOME A PARTNER

Many supporters have become Partners for the Future by including the Center in their long-term giving plans. Some have planned a bequest through their Wills; others have made a life-income gift. By making a deferred gift, supporters can:

- Provide a legacy of values for loved ones
- Ensure their intentions are carried out
- Help safeguard the Center's long-term work
- Join our **Partners for the Future** society

Making a long-term commitment to a charitable organization is a personal and commendable choice. If you'd like to learn more about the benefits of gift planning, contact us today.

Toll free **1-888-414-7752**
plannedgiving@splcenter.org
 Or return the envelope provided to:

Planned Giving Office
 Southern Poverty Law Center
 400 Washington Avenue
 Montgomery, Alabama 36104

You can also visit our
 planned giving page at
www.splcenter.org/partner.

People who are holding securities that have grown considerably in value may be hesitant to sell them and incur a capital gains tax. Did you know that these appreciated securities can make excellent gifts to the Center — and provide you with a secure fixed income for life?

If you own a security that is paying minimal dividends, consider using it to establish a charitable gift annuity, which may increase the amount of income you receive and avoid capital gains tax otherwise due at the time the gift is made.

A charitable gift annuity is a contractual arrangement between you and the Center. You donate cash or marketable securities in exchange for a fixed annual payment for life. At your death (or the death of the second life in the case of a two-life agreement), the remaining value of the gift passes to the Center.

The frequency and amount of payments are based on your age at the time you fund the gift annuity. Payments will never change and are designed to continue regardless of how long you live or what happens to the economy. The minimum age for a charitable gift annuity with the Center is 60 and the minimum donation is \$5,000, although deferred gift annuities can be established at age 55.

Choose the Securities You Donate Carefully

A security owned for one year (or less) is considered a short-term asset, and usually will not produce attractive tax benefits when donated to charity. In general, the income tax charitable deduction for a short-term asset is limited to your cost basis (the amount you paid for the stock).

If you own securities that have decreased in value, selling them and using the proceeds to make a cash gift to the Center is more beneficial. In that case, you can take a capital loss on your federal tax return and still enjoy a charitable deduction up to 50% of your adjusted gross income.

On the other hand, if you have owned a security for more than one year which has appreciated in value, but is paying you minimal dividends, consider the advantages of setting up a charitable gift annuity.

We would be very happy to talk to you about gift annuities. Contact the Center's Planned Giving Department for a free, no-obligation Summary of Benefits personalized for you.

CENTER TO RELEASE NEW RESOURCE FOR PARENTS

For more than 15 years, Teaching Tolerance has helped educators nationwide reach our young people with lessons of respect and understanding. This Spring, the project will extend its support to children's first teachers: their parents.

A new guidebook, *Beyond the Golden Rule: A Parent's Guide to Preventing and Responding to Prejudice*, builds on interviews with experts and parents from across the country and offers practical advice for caregivers of children in three age groups: the preschool years (ages 2-5), the elementary and preteen years (ages 6-12) and the teen years (ages 13-17.)

"For several years, we've offered tips for parents online and in Teaching Tolerance magazine," said project director Jennifer Holladay. "This guidebook represents a more formidable commitment to helping parents, grandparents and guardians nurture appreciation for human differences among our nation's next generation of leaders."

Beyond the Golden Rule already is receiving praise from parenting experts across the country.

"Dividing the guidebook by developmental level, using such varied and fine examples from so many families nationwide, using the wisdom of the experts and concluding with specific tips makes for a comprehensive and easily readable volume," said Dr. Kerby T. Alvy, the founder and executive director of the Center for the Improvement of Child Caring in Studio City, CA. "*Beyond the Golden Rule* should become basic reading for all parents."

Beyond the Golden Rule will be available at no cost at www.tolerance.org/parents. Print copies will be made available at cost to children's caregivers nationwide.

FBI TO REOPEN CIVIL RIGHTS "COLD CASES"

On February 27, Center President Richard Cohen stood alongside U.S. Attorney General Alberto Gonzales to announce a renewed commitment by the federal government to investigate the deaths of 76 men and women killed between 1952 and 1968, likely victims of racial violence.

In 1989, the Center built the Civil Rights Memorial, honoring 40 people who were killed during the Civil



The timeline on the tablet of the Civil Rights Memorial honors 40 people killed during the Civil Rights era.

Rights era by those determined to undermine freedom and equality for African Americans. Since the Memorial's dedication, six people have been convicted for their roles in murders chronicled on the monument.

"The FBI and the Justice Department have played key roles in these successful prosecutions and, for this, we thank them," Cohen remarked. "But the truth is that more remains to be done."

In the 1980s, as Center investigators researched instances of racial violence during the Civil Rights era, they documented the deaths of 40 people whose names appear on the Memorial, along with 76 additional killings where available evidence was limited. These cases now rest in the hands of the FBI and the Department of Justice.

"There are murder cases from the Civil Rights era that still cry out for justice, cases that cry out for further investigation," Cohen said. "Now, with today's announcement, there is renewed hope that these cries will be answered."

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Philip Temple is a partner in the law firm of McCarthy Fingar LLP, White Plains, New York. He frequently speaks on taxes, charitable giving and estate planning. In each issue of this newsletter, Mr. Temple answers questions about planned giving for Center supporters. Please send your questions to the Center in the envelope provided.

Have a Planned Giving Question?

We're eager to answer your questions and to be of assistance. Use the enclosed envelope to drop us a note or e-mail your questions to us at plannedgiving@splcenter.org.

You can also reach us by mailing your questions to: Planned Giving Office, Southern Poverty Law Center, 400 Washington Avenue, Montgomery, Alabama 36104



Does property placed in a living trust avoid probate, and is it removed from my taxable estate?

E. S. North Carolina

Property placed in a living trust does avoid probate, but is not removed from your taxable estate.



I would like to make a gift of stock to the Center. Can my broker transfer the stock electronically?

N. K. Georgia

Yes, your broker can transfer your gift of stock directly to the Center's brokerage account with Smith Barney. The Center's account number is 445-11583-1-7. The DTC (direct deposit number) is 0418. Please notify the Center's Planned Giving Department when you transfer stock to ensure that your gift is properly credited and acknowledged. You may call toll-free 1-888-414-7752 or send an e-mail to plannedgiving@splcenter.org.



If I fund a charitable gift annuity with the Center using appreciated securities, am I entitled to a charitable deduction for the full fair market value of the securities?

S. L. Florida

No. When you establish a charitable gift annuity using appreciated stock, the stock is valued at market value, but your charitable deduction is only for the gift portion. Your friends in the Center's Planned Giving Department can provide more information.



How do I determine my federal income tax charitable deduction for a gift of stock?

P. R. Massachusetts

Generally, the average of the stock's high and low trading prices on the date of the gift determines the value of the gift. If your broker transfers your stock directly to the Center, the date of the gift is the date the stock is received in the Center's brokerage account.