



your legacy

For a more just and
sustainable economy



SumOfUs is over 12 million people taking action to pressure corporations to adopt policies that promote economic justice, the health and welfare of citizens, and protection of the environment. Our campaigns address ending corporate use of child labor and other unethical labor practices. We promote practices to curb global warming, to protect the environment and human rights. Our community also works to promote democracy and end corruption.



“SumOfUs members send an important signal that people have the power to fight back against corporations.”

A Fairer Future

A message from our Executive Director

As a SumOfUs member, you know the power of a group of people who refuse to stand idly by while corporations abuse people, democratic institutions and the environment.

This power is what attracted me to SumOfUs. I grew up in Sheffield, a city in the north of England, where it wasn't unusual for big companies to lay off workers without notice or close their doors overnight. Looking back, it's not right for corporations to be able to wield that level of power and create such uncertainty in our communities.

This is one significant reason why I am grateful that you continue to join with millions of others in our SumOfUs community to make our campaigns so effective. From bees to the Bayer-Monsanto merger campaign, we've had fantastic successes. But for every win, there are easily another hundred issues we just don't have resources to take on.

Our senior leadership team has a long-term vision to change that. We aim to be able to expand our capacity for campaigns, take legal action against corporations when necessary and continue our strong tradition of using technology to connect people around the world so they can create social change. Working alongside our members and donors, we will turn this vision into reality.

You can help us make our planet a fairer place for everyone—and ensure people always come before profits—by considering a gift in your will to SumOfUs. It's a fantastic way to express your deepest personal values and build a legacy for future generations.

Hannah Lownsborough

SumOfUs is over 12 million people dedicated to stopping big corporations behaving badly. We use our power as consumers, workers and investors to hold the biggest companies in the world to account.





A vision for a better future

A message from our Volunteer Board Chair

“My parents and grandparents taught me that a fulfilled life is one where you leave the world a little bit better than you found it.”

I have a confession to make. I have a yearning to make small changes resonate on a big, big scale.

Right now, you and I are part of the SumOfUs community and we are holding corporations accountable through our campaigns. But I want to see a day where our power as consumers and citizens becomes an antidote to runaway corporate power. A day when balance is restored. I suspect you would agree this is something worth working toward.

At SumOfUs, this is our vision for the future.

One key to achieving this vision is developing a ‘rapid-response’ capability. We want to ensure we can seize on powerful moments where our community can have a big impact. To do this, our senior leadership all recognize we must make a long-term investment.

I hope you will join us in building a future where the balance of power shifts back to people and communities and our planet’s health. I hope you will consider making a gift in your will to SumOfUs.

This would be an honor and an acknowledgement of the community we share. Your consideration of this very special gift will strengthen the incredible web of support SumOfUs relies on to have international conversations on changing bad corporate behaviour.

Tate Hausman

Your donations drive successful campaigns

USA AND CANADA

Major retailer Lowes to take bee-killing neonics off their shelves.

OREGON, USA

Hood River Country will not allow Nestlé to bottle their water.

HONDURAS

FMO pulls funding from Agua Zarca dam project after murder of Berta Cáceres.

PERU

Newmont Mining scraps environmentally destructive Conga project.

BRITAIN

Government scraps plans for xenophobic 'foreign workers lists'.

AUSTRALIA

Standard Chartered abandons investment in reef-killing mine project.

FRANCE

France bans bee-harming neonicotinoid pesticides.

INDONESIA

McDonalds agrees to a zero-deforestation palm oil policy.

NEW ZEALAND

Stopped corporate buyout of water in drought-prone Canterbury Plains.



Our promise for your legacy

Making a gift in your will is simple, but it's a very important decision. With our six promises for legacy donors, you can rest assured that your wishes will be honoured.

4

You have the right to change your mind about a gift in your will to SumOfUs at any time in the future.

1 Making a gift in your will is a very personal decision. You are completely in control of the details and your family and loved ones must always come first

1

5 It is your choice to let us know that you've left SumOfUs a gift in your will.

5

2 You and your gift will always be treated with utmost sensitivity and respect

2

3 If you decide to notify us of your gift, you can choose how we communicate with you in the future about SumOfUs.

3

6 Your gift will be used carefully and cost-effectively so that it has the greatest impact.

6



A strong future for your legacy

A message from our Director of Finance and Operations

As you reflect on the more inspiring aspects of making a gift in your will to SumOfUs, I'd like to highlight something very practical.

SumOfUs is an exceedingly solid organization. We have healthy finances thanks to a combination of careful management and common sense. Whenever we plan projects, we always ask “is this a responsible way to spend the money our donors have given us?” Our board of directors provides volunteer oversight. And our finances are audited each year by an independent accounting firm to ensure our transparency.

As the Director of Finance and Operations, I'm really proud of this. As a lifelong activist (yes, I was right there in the 60s!), I want every single penny possible to go toward making positive social change in our communities. I greatly admire the heroic commitment our members—and especially our donors—have to making progressive social change and stopping corporate abuse. I am personally invested in ensuring your carefully considered and generously given donations are managed for maximum impact.

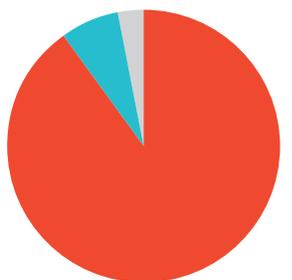
If you do decide to include a gift in your will for SumOfUs, after you provide for your loved ones, you will help us build up our reserves so we can expand our work, do more creative campaigning and win more victories.

You'll be helping to sustain long-term campaigns like the fight to protect bees and terrible developments like the Bayer-Monsanto merger. It's a fantastic way to ensure a future for economic justice and environmental health. All of us at SumOfUs pledge our commitment to be careful stewards of your legacy.

China Brotsky

A solid foundation for your legacy

How we spend donations:



- Programs (90%)
- Admin (7%)
- Fundraising & Development (3%)

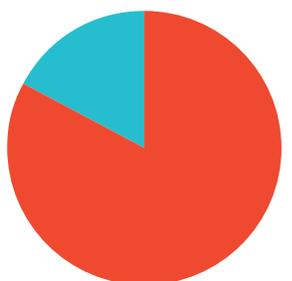
Your trust and confidence is paramount and that's why SumOfUs built a solid foundation right from the beginning.

We are a registered and incorporated 501(c)4 social welfare nonprofit, a type of tax-exempt organization in the United States that is legally able to lobby public officials and work with trade unions, which is a key part of our work challenging corporate power.

SumOfUs also has branches in the United Kingdom and Ireland.

SumOfUs is regularly audited by Lederer, Levine & Associates, LLC, an independent accounting firm based in the United States. We have always received what is called a "clean opinion," namely that no irregularities have ever been found and that we adhere to strict accounting rules and procedures.

Where our funding comes from:



- Online donations
- Foundation grants

SumOfUs doesn't accept any contributions from governments or corporations. More than 80% of our funding comes from people like you making individual contributions. The balance of our funding is provided by charitable trusts and grant-giving foundations who support our work.

This allows us to stay independent, keep pressure on governments and corporations, and respond quickly to crisis situations.

You can have confidence that all your gifts to SumOfUs will be used prudently and effectively.



“Donors are
the key to our
campaign
success, both
today and in
the future.”

Helping you create your legacy

A message from our
Fundraising Manager

Thanks to donors like you, our SumOfUs community is able to successfully hold corporations to account and work to shift power back to people and communities.

This is what makes my job so incredibly rewarding. Thank you.

Just like you, I share SumOfUs’ values and I’m excited about a future that’s fairer for everyone. As you think about the success we’ve had together and what we can build for tomorrow, I hope you will consider the most profound way you can help—making a gift in your will to SumOfUs.

On the right-hand side, I’ve included a little information that may be helpful to your legal and financial advisor. You can also contact me directly anytime using the information below. I’d be happy to answer questions or provide any information you’d like as you consider this very special gift.

Tricia Rich
donor@sumofus.org
US: +1 347 826-4656
UK: +44 20 3286 4067

Information for your lawyer and financial advisor

Plain language sample clauses for your will

Sample Bequest of Remainder of Estate

“I give, devise, and bequeath to the SumOfUs, TAX I.D. #45-2513966, all [or state the fraction or percentage] of the rest, residue, and remainder of my estate, both real and personal. SumOfUs may be contacted in care of its permanent mailing address P.O. Box 1128, New York, NY 10156.”

Sample Bequest of Specific Amount

“I give, devise, and bequeath \$_____ to the SumOfUs, TAX I.D. #45-2513966. SumOfUs may be contacted in care of its permanent mailing address P.O. Box 1128, New York, NY 10156.”

SumOfUs’ full legal name:

SumOfUs

SumOfUs’ permanent mailing address:

P.O. Box 1128, New York, NY 10156

SumOfUs’ federal tax identification number:

45-2513966

SumOfUs is a registered 501(c)4 organisation. As such, donations under \$1,000 aren’t tax deductible or eligible for schemes like the UK’s Gift Aid. For more information on tax deductibility where you live, please contact your local tax authorities. If you live in the United States we can take tax-deductible contributions over \$1,000. Please contact China Brotsky (china@sumofus.org; 1-347-826-4656) for more information about this option.

Note: The information provided here is of a general nature and should not be taken as a substitute for professional advice. We urge you to consult with your advisors to ensure that a particular option is right for your financial and estate planning situation.

“The



greatest
danger

to our
future is

apathy.”