



THE AMERICAN LEGION

DEPARTMENT OF WISCONSIN FOUNDATION

For more information on The American Legion, Department of Wisconsin or The Wisconsin American Legion Foundation, or to speak to someone confidentially, please contact:

The American Legion, Department of Wisconsin
Attn: Department Adjutant
2930 American Legion Drive Portage, WI 53901

Telephone: (608) 745-1090

For more information, please visit:

wilegion.org

The Wisconsin American Legion Foundation is a non-profit 501 c (3) corporation. Your contribution is tax-deductible within the limits prescribed by law.

This brochure is neither intended to be, nor should it be construed as, legal or tax advice. We recommend you consult with your lawyer or tax advisor before making a financial decision on a planned gift.



THE AMERICAN LEGION

DEPARTMENT OF WISCONSIN

Essential Planning Guide



PLUS Veterans Memorials, Benefits, and Guide to Planned Giving & Bequests



THE AMERICAN LEGION PREAMBLE

**For God and Country, we associate ourselves
together for the following purposes:**

To uphold and defend the Constitution of the United States of America; to maintain law and order; to foster and perpetuate a one hundred percent Americanism; to preserve the memories and incidents of our associations in all wars; to inculcate a sense of individual obligation to the community, state and nation; to combat the autocracy of both the classes and the masses; to make right the master of might; to promote peace and goodwill on earth; to safeguard and transmit to posterity the principles of justice, freedom and democracy; to consecrate and sanctify our comradeship by our devotion to mutual helpfulness.

Retained Life Estate

Many Estate Plans include provisions for a Life Estate. In a Retained Life Estate agreement, you can transfer an asset or property to The Wisconsin American Legion Foundation and continue to use it and/or receive the income it generates.

In the case of donating a property through a Life Estate, you will receive an immediate income and gift tax deduction equal to the future value of the property that the Foundation will eventually receive. The amount depends on the value of the property, your age, and the age of any person given life use. You would continue to be responsible for maintenance, insurance, and property taxes while you continue to use the property. After your life use, and that of any named survivor, The American Legion, Department of Wisconsin would receive the property outright.

If you are considering a Retained Life Estate option, contact your attorney, investment advisor, and the Department Adjutant at (608) 745-1090.

A Timeless Gift

The American Legion, Department of Wisconsin urges you to consider making an investment in the future of our Nation by supporting the programs of The American Legion. By selecting one or more of the planned giving options highlighted in this brochure you can preserve the legacy of America's veterans.

Your gift will truly make a lasting impact. It will help ensure that future generations understand and benefit from The American Legion's important contributions to National Security, Veterans Affairs and Rehabilitation, Youth Mentorship, and Patriotism.



Qualified Retirement Plans

Naming The American Legion, Department of Wisconsin as a beneficiary or contingent beneficiary of your 401K or other retirement plan assets can possibly save your estate both income and federal estate taxes. The entire remaining assets or a specified percentage can be designated .

The potential savings of income and estate taxes are important because the combination of federal income, estate, and state taxes can seriously erode the value of retirement savings.

Your retirement plan administrator can provide you with the appropriate forms to include The American Legion, Department of Wisconsin as either a beneficiary or contingent beneficiary of your retirement plan assets.

IRA Charitable Rollover

Are you 70 1/2 or older? If so, you can donate to The American Legion, Department of Wisconsin from your IRA without incurring either income tax or early retirement withdrawal penalties. There is a maximum amount so contact your IRA custodian to make a gift to The American Legion, Department of Wisconsin from your IRA.

Life Insurance

A gift of a life insurance policy is another easy and practical way of making a gift to The American Legion, Department of Wisconsin. You may designate The American Legion, Department of Wisconsin as owner/beneficiary of either a new policy or an existing policy and there are several potential benefits to you in selecting this form of gift.

For example, you may receive a charitable deduction on your income tax by assigning ownership of an insurance policy to The American Legion, Department of Wisconsin. Your insurance agent will be able to provide you with the appropriate forms to accomplish your goals.

*Have questions? Contact the Department Adjutant
at (608) 745-1090 for answers.*

Complete this form today! VETERAN SERVICE RECORDS

The American Legion has fully accredited Service Officers located at the Zablocki VA Regional Office in Milwaukee. These representatives are at your service to help develop and file claims and assist you and/or your dependents in applying for various benefits to which you may be entitled . Local American Legion Posts generally have a Post Service Officer who can provide guidance necessary in filing your claim. It is recommended that you list numbers and locations of the following noted items so that your family will have the details necessary to file for benefits if you are incapacitated or deceased.

Full Name: _____
Date & Place of Birth: _____
Location of Birth Certificate: _____
Social Security Number: _____
Service Number: _____
Place of Entry into Service: _____
Dates of Service: _____
Discharge Type: _____
Location of Discharge Certificate: _____
Names & Addresses of Those You Served with : _____
Duty Stations: _____
VA Claim Number: _____
County & State Where Discharge is Recorded: _____
Spouse 's Full Name: _____
Date & Place of Marriage: _____
Location Of Marriage Certificate: _____
Names of Children: _____
Location of Children's Birth Certificates: _____
Location of Will: _____
Insurance: _____
Bank Accounts: _____
Mortgage: _____

You have earned the right to certain veterans benefits. Use this form or provide this information to your family in case of an emergency. Retain a copy for your own records or provide it to your Post for safekeeping.

Department of Wisconsin Veteran Service Office
5400 W. National Ave., #164 Milwaukee, WI 53214
(414) 902-5722



Veteran Memorials & Benefits

Veteran Service Records.....	1
What to do Before a Veteran Dies.....	3
Essential Actions to Take After a Veteran Dies.....	4
Report a Military Retiree’s Death.....	4
Telephone Reference.....	5
VA Burial and Memorial Benefits.....	6
Headstone and Markers.....	7
Burial Flags.....	8
Presidential Memorial Certificates.....	8
Burial in a VA National Cemetery.....	9
Arlington National Cemetery.....	10
Military Funeral Honors.....	10
Reimbursement of Burial Expenses.....	11

Guide to Planned Giving

Honoring a Lifetime of Service.....	14
The Four Pillar Society.....	15
Bequests.....	15
Qualified Retirement Plans.....	16
IRA Charitable Rollover.....	16
Life Insurance.....	16
Retained Life Estate.....	17
A Timeless Gift.....	17

The Four Pillar Society

The Four Pillar Society is a recognition program honoring individuals who have included The American Legion, Department of Wisconsin in their estate plans. As a member of **The Four Pillar Society**, you qualify for important benefits, such as:

- Listing of your name in the Foundation’s annual report (if desired).
- Recognition during the annual Department Convention.
- Invitations to events where you will meet with National, Department and Foundation leaders and other members of The Four Pillar Society, providing you with an opportunity to gain new insights into The American Legion’s past, present, and future.

Your membership in **The Four Pillar Society** will inspire others to follow your example in making arrangements for a deferred gift to The American Legion, Department of Wisconsin. Members of **The Four Pillar Society** play a critical role in ensuring that the history and programs of The American Legion will be preserved for the benefit of future generations.

Bequests

One of the easiest forms of charitable estate planning is naming the Wisconsin American Legion Foundation in your will through a bequest provision. Your will can specify an asset, an amount of money, a percentage of your estate, or a variety of other designations. Including one sentence in your will is all you have to do to make a gift. For example:

“I give and bequeath to the Wisconsin American Legion Foundation or its’ successor (specific dollar amount or percentage) for the benefit of The American Legion, Department of Wisconsin.”

Unrestricted bequests provide the Foundation the flexibility to use your gift where the need is greatest. However, inquiries for specific uses are welcomed. For example, if you want to ensure the future of Camp American Legion or the Oratorical Scholarship competition simply include language to that effect. We strongly recommend that you have your attorney draft or revise your will. This will ensure that your wishes to provide for your loved ones and charities like The American Legion, are fully met.

Please let us know if you named The American Legion, Department of Wisconsin in your will, so we may include you in **The Four Pillar Society**.



PRESERVING A LEGACY, HONORING A LIFETIME OF SERVICE

It is easier than you think to leave a legacy for future generations to help ensure that the rich history and valuable programs of The Wisconsin American Legion Foundation are forever preserved.

The American Legion was founded on Four Pillars - Strong National Security, Taking Care of Veterans, Mentoring Youth, and Promoting Patriotism and Honor. A planned gift can help guarantee that we are able to continue to support these founding principles.

The American Legion, Department of Wisconsin was established to recognize and honor donors who have made provisions for a future gift to The American Legion through their Will, IRA, Life insurance or other planned gift.

The Foundation is grateful for all types of gifts and welcomes the opportunity to work with you and your personal advisor to determine if one or more planned giving arrangements are right for you.

Your privacy is important to us. All communications are held in strict confidence and are without obligation.

If you have already included The American Legion, Department of Wisconsin in your estate plan, let us thank you. Please contact the Department Adjutant at (608) 745-1090. Of course, if you prefer to remain anonymous, we will respect your wishes.

What to do before a Veteran dies

The first step in preparing for what is inevitable is to make certain your family has easy access to important documents including:

- A copy of your discharge certificate (DD Form 214; NGB 22 or 20 Year Letter)
- A copy of VA documents, if any, indicating a VA claim number
- A copy of your marriage certificates and divorce decrees (if any)
- A copy of all family insurance policies
- A copy of any VA insurance policies including beneficiary designation
- A copy of your will
- A copy of your durable power of attorney
- A copy of your advanced-care directive or living will
- Instructions on how you want your body to be disposed of
- Instructions about your wishes for a military funeral
- Location of safety deposit boxes



Essential Actions to Take After a Veteran Dies

There are numerous tasks to be completed following the death of a veteran. The following checklist will assist you in determining if all required actions have been completed.

- Contact the Funeral Director of your choice to arrange for interment.
- Contact your primary spiritual advisor to arrange for the services you desire.
- Contact the local American Legion Post and notify them of your loss.
- Contact your County Veteran Service Officer to identify/apply for benefits.
For a current list of Service Officers go to: www.wicvso.org
- Contact the Department of Veterans Affairs (VA) to obtain:
 - a. Flag for burial (funeral directors will assist in this matter);
 - b. Burial assistance (if member died of a service-connected disability or in a VA hospital);
 - c. Dependency and Indemnity Compensation (DIC).
VA Regional Office..... 1-800-827-1000
- Contact the Social Security Administration (SSA) to apply for the \$255 burial payment paid only to spouses, not adult children.
SSA..... 1-800-772-1213
- If covered under Veterans' Group Life Insurance (VGLI), report the death to the Office of Servicemembers' Group Life Insurance (OSGLI). If covered by VA National Service Life Insurance, contact (NSLI) office.
VGLI Office..... 1-800-419-1473
NSLI Office..... 1-800-669-8477
- The tradition of burial at sea is open to any active duty, retired, honorably discharged veteran or their family members. Anyone desiring burial at sea should indicate that preference in writing in a will or other legal document. During funeral planning, the executor/executrix of the estate should contact:
Burial at Sea..... 1-866-787-0081
- Families of eligible veterans should request funeral honors through their funeral director. The funeral director will contact the appropriate Military Service to arrange for the funeral honors detail.
Military Funeral Honors..... 1-877-645-4667

Report A Military Retiree's Death

Please see: www.dfas.mil/dfas/retiredmilitary/survivors/retiree-death.html



THE WISCONSIN AMERICAN
LEGION FOUNDATION

Guide to Planned Giving





Tell a Veteran

of the Many Benefits of Becoming a Member of The American Legion, Department of Wisconsin

Members of The American Legion, Department of Wisconsin have an unending catalog of opportunities to improve their life and utilize their unique talents.

- High School Oratorical Contest
- Camp American
- Legion Baseball
- Badger Boys State
- School Awards
- ROTC Awards
- Scouting
- Flag Education
- Junior Shooting Sports
- Patriotic Observances
- Children & Youth Programs
- Employment Programs
- Blood Donor Program
- Law & Order Program
- Disaster Relief
- Veterans Services
- Hospital Services
- Legislative Programs
- ...and many more

Members also have a network of professionals at their fingertips to help them with such things as: Veterans Benefits, Employment Services, Temporary Financial Assistance, Educational Assistance and Disaster Assistance. There are also various insurance programs available, including an eye care and prescription program and many more discount programs including car rentals, hotels/motels, moving and storage, major attractions, and credit cards.

For more information, please visit:

wilegion.org

Telephone Reference

AMERICAN LEGION

Department Headquarters.....	1-608-745-1090
Department Service Office.....	1-414-902-5722
Camp American Legion.....	1-715-277-2510

CEMETERIES

Northern Wisconsin Veterans Memorial Cemetery.....	1-715-635-5360
Central Wisconsin Veterans Memorial Cemetery.....	1-715-258-5586
Southern Wisconsin Veterans Memorial Cemetery.....	1-262-878-5660
Arlington National Cemetery.....	1-877-907-8585

INSURANCE

National Service Life Insurance (NSLI).....	1-800-669-8477
Servicemembers' Group Life Insurance (SGLI).....	1-800-419-1473
Veterans' Group Life Insurance (VGLI).....	1-800-419-1473

PERSONNEL RECORDS (DD FORM 214; NGB 22 OR 20 YEAR LETTER)

National Personnel Records Center.....	1-314-801-0800
Naval Reserve Personnel Center.....	1-314-801-0800

RETIREMENT HOMES

Wisconsin Veterans Home at King.....	1-715-258-5586
Wisconsin Veterans Home at Union Grove.....	1-262-878-6700
Wisconsin Veterans Home at Chippewa Falls.....	1-800-947-8387

VA (DEPT. OF VETERAN AFFAIRS)

Basic Services (Regional Offices).....	1-800-827-1000
Wisconsin State Benefits.....	1-800-947-8387

MISCELLANEOUS

Social Security Administration.....	1-800-772-1213
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VETERAN BENEFITS

VA Burial & Memorial Benefits

The veteran who dies and was discharged from active duty under conditions other than dishonorable may be eligible to receive the following:

- *Burial in a National Cemetery*
- *A standard Government headstone or ground plaque*
- *A Government issued United States Flag to drape the casket, which is then presented to the surviving spouse or next-of-kin at the interment ceremony*
- *A Presidential Memorial Certificate signed by the President of the United States*

Reimbursement of Burial Expenses

For service-connected deaths on or after September 11, 2001, VA will pay \$2,000 towards burial expenses. If the veteran is buried in a VA National Cemetery, some or all of the cost of moving the deceased may be reimbursed.

For the non-service related death of a veteran who was:

- Receiving service-connected compensation or non-service connected pension or
- Who was entitled to receive VA pension or compensation but decided not to reduce his/her military retirement or disability pay or
- Died in a VA hospital or while in a nursing home under VA contract or
- While in an approved state nursing home

Veterans Administration will pay up to \$700 toward burial and funeral expenses and a \$300 plot interment allowance. If the death happened while the veteran was in a VA hospital or under contracted nursing home care, some or all of the costs for transporting the deceased's remains may be reimbursed.

The \$700 plot interment allowance may be paid to the state if a veteran is buried with out charge for the cost of a plot or interment in a state-owned cemetery reserved solely for veteran burials. Burial expenses paid by the deceased's employer or a state agency will not be reimbursed.





Arlington National Cemetery

Arlington National Cemetery is under the jurisdiction of the Army. Eligibility for burials is more limited than at other national cemeteries. For information on Arlington burials, write to Superintendent, Arlington National Cemetery, Arlington, VA 22211 or call 1-877-907-8585. You can also visit Arlington National Cemetery's website at: www.arlingtoncemetery.mil.



Military Funeral Honors

As of January 1, 2000, all eligible veterans, to include military retirees, are entitled to military funeral honors. At a minimum, the funeral honors ceremony will consist of the folding and presentation of the American flag and the playing of Taps. At least two uniformed military personnel, in addition to a bugler if available, shall perform the ceremony. If a bugler is not available, a high quality compact disc may be used. The Department of Defense has contracted a ceremonial bugle that does not require a trained bugler. For information on this item visit: www.ceremonialbugle.com. One of the uniformed military personnel will be from the deceased veteran's parent military service and will present the flag to the next of kin.

The Military Services may provide additional elements of honors and may use additional uniformed military personnel or other authorized providers, such as members of a veterans organization, to augment the Funeral Honors Detail.

The next of kin or appropriate individual must request the funeral honors. The funeral honors are not provided automatically. Department of Defense policy calls for the funeral directors rather than the next of kin to contact the military. This toll-free number 1-877-MIL-HONR (645-4667) has been set up for funeral directors to coordinate the ceremonies. The Department of Defense has established a website: www.militaryfuneralhonors.osd.mil that explains the funeral honors process.

Headstones & Markers

VA provides head stones and markers anywhere in the world for the unmarked graves of eligible veterans . For the marked graves of veterans who died on or after November 1, 1990, double marking is authorized . Flat bronze, flat granite, flat marble, upright granite and upright marble type markers are available to mark the grave in a style consistent with the cemetery. Niche markers are also available for urns.

When burial is in a national cemetery or state veterans' cemetery, the headstone is ordered by the cemetery, which will place it on the grave. When burial occurs in a private cemetery, the headstone must be applied for from VA. The headstone is shipped at governmental expense. VA does not pay the cost of placing the headstone on the grave. The cost is borne by the veteran's family or other party. These charges may be included in many prepaid funeral packages. VA Form 40-1330 (application for headstone) can be obtained from most funeral home directors, through Veteran Service Officers or through VA. This form may also be downloaded and printed out by visiting: www.va.gov/vaforms/va/pdf/va40-1330.pdf.

New VA rules allow for custom inscriptions up to the space available on headstones. Belief symbols such as Christian Crosses, Stars of David, Islamic Crescents and others are available; however, VA has severely limited other graphics such as logos, military decorations, Veterans Service Organization emblems and fraternal organization marks. The best way to assure that you get the desired stone or plaque is by obtaining and filling out VA Form 40- 1330, Application for Standard Government Headstone or Marker for Installation in a Private or State Veterans' Cemetery, and filing it with other vital documents.

When a spouse or child is buried in the same grave as a veteran, VA will send out a contractor to inscribe the reverse side of the headstone. Twenty-year reservists generally are eligible for a headstone or marker.

Specific steps must be taken for authorization from The American Legion to affix an American Legion emblem onto the headstone. Contact the Department Adjutant at (608) 745-1090 for information.



Burial Flags

A United States flag is provided, at no cost, to drape the casket or accompany the urn of a deceased veteran who served honorably in the US Armed Forces. It is furnished to honor the memory of a veteran's military service to their country. Eligibility for Former Members of Selected Reserve was added by Section 517 of Public Law 105-261. The flag will be issued once only for burial purposes and will not be replaced if lost, stolen, damaged or destroyed. National cemeteries with Avenues of Flags and many state veterans cemeteries accept donations of burial flags for mass display on Memorial Day, Veterans Day and certain other occasions. The standard issue burial flag is made of cotton and will not withstand continuous outdoor display. Burial flags may be obtained at VA regional offices, national cemeteries and most local post offices. Overseas, American flags can be obtained from US Embassies or US Consulates.

Presidential Memorial Certificates

Presidential Memorial Certificates express the nation's recognition of a veteran's service. Certificates bearing the signature of the President are issued honoring deceased veterans with honorable discharges. Eligible recipients include next of kin and other loved ones. The veteran may have died at any time. To establish honorable service, a copy of a document such as a discharge (DD Form 214; NGB 22 or 20 Year Letter) must accompany requests for a certificate. A Presidential Memorial Certificate is issued automatically when a headstone or grave marker is issued. If the certificate is lost, stolen or destroyed, a new one may be issued if requested in writing. VA regional offices can assist in applying for original or replacement certificates.



Burial in a VA National Cemetery

Every veteran and member of the Selected Reserves who is entitled to retired pay is entitled to burial in a national cemetery as long as space is available and the following conditions are met:

- *Veteran was discharged under conditions other than dishonorable.*
- *Veteran was not subsequently convicted of a capital crime. For claims filed after December 16, 2003, conviction for offenses involving prohibited weapons of mass destruction, genocide and international terrorism is a bar to benefits.*
- *With certain exceptions, service beginning after September 7, 1980 as an enlisted person and service after October 16, 1981 as an officer, the individual must have served for a minimum of 24 months or the full period for which the person was called to active duty.*

For a full description of eligibility requirements visit:
www.cem.va.gov/bbene/eligible.asp

Burial benefits in a VA national cemetery include the gravesite, a headstone or marker, opening and closing of the grave and perpetual care. Many national cemeteries are closed to new casket interments. Funeral directors or others making burial arrangements must apply at the time of death.

Spouse and minor children of eligible veterans and of service members may also be buried in a national cemetery. If a surviving spouse of an eligible veteran marries a non-veteran, and remarriage was terminated by death or divorce of the non-veteran, the spouse is subsequently eligible for burial in a national cemetery.

Please visit the National Cemetery Administration website at www.cem.va.gov/cem/cemsnmc.asp for a complete listing of all national cemeteries and state veterans cemeteries. You may also email your questions on burial benefits eligibility directly to VA at: public.inquiry@va.gov.