

BUILD A LEGACY OF LIBERTY THROUGH FEE

ESTATE PLANNING AT A GLANCE

Leave them more than wealth.
Leave them the ideas that make wealth possible.

FEE FOUNDATION *for* ECONOMIC EDUCATION

YOUR LEGACY



What Will You Leave Behind?

We all leave something behind.

Our families and communities inherit the material wealth we have built and accumulated: a home, a business, a portfolio, a school, a charitable institution.

But material wealth does not explain itself. If we cannot teach the next generation how prosperity is created, or why freedom matters, they may inherit our prosperity without understanding how to preserve it.

Those who leave a legacy of freedom are stewards of an inheritance larger than themselves. They understand that prosperity and human progress rest on principles that each generation must understand, defend, and renew.

For over 80 years, the Foundation for Economic Education has helped students, educators, and lifelong learners discover the principles that make freedom possible.

A legacy gift to FEE gives future generations the ideas, principles, and confidence required to preserve freedom and create prosperity anew.

Leave them more than wealth. Leave them the ideas that make wealth possible.

"FEE changed my life, it helped me find my purpose. I'm grateful to everyone."

—Kayleigh Flores, FEE program alumnus

WHY FEE

Ideas That Change How People See the World

Economic education is based on more than formulas. It is about understanding people, institutions, incentives, and the principles that allow individuals and societies to flourish.

Since 1946, FEE's work has helped people understand how voluntary cooperation, entrepreneurship, markets, civil society, and personal responsibility create opportunities for human flourishing.

FEE alumni gain more than knowledge. They gain a new way of seeing the world based on a deeper understanding of what makes freedom and prosperity possible.

"What really impresses me is the way FEE is concerned with broader social and ethical issues related to economics. I had always thought of entrepreneurs as 'evil businessmen' out to get the 'little guy.' Through FEE's online course, I learned how markets work and about the importance of entrepreneurs in the economy. FEE has shifted my whole outlook."

—Nik Wight, FEE program alumnus

MISSION

To inspire, educate, and connect future leaders with the economic, ethical, and legal principles of a free society.

VISION

A world where the ideas of liberty are familiar, credible, and compelling to the rising generation.

PRINCIPLES

Individual liberty, free-market economics, entrepreneurship, private property, high moral character, and limited government.



A LEGACY THAT BEGAN WITH AN IDEA

Leonard E. Read Understood: Ideas Are the Inheritance that Lasts

Leonard E. Read founded the Foundation for Economic Education based on an important conviction: a free society can only survive when its members understand and value the ideas forming its base.

Read knew that material prosperity, however hard-won, does not explain itself. A business, a home, a nation of abundance: none of it teaches the next generation why it exists or how to preserve it. That understanding has to be renewed, generation after generation, through ideas.

For 37 years, Read devoted himself to this work: advancing individual liberty, private property, economic freedom, and the dignity of human action. He believed lasting change doesn't start with a government program or a political campaign. Change begins when one person encounters an idea and integrates it fully into their life.

Today, FEE carries that conviction forward.

The Leonard E. Read Legacy Society invites you to become a steward of that inheritance, to ensure future generations receive not just what we built, but the ideas that made building it possible.



WHY YOUR LEGACY MATTERS NOW

What Will the Next Generation Do with What We Leave Them?

The next generation will inherit the material wealth we leave behind. But wealth alone doesn't explain how it was created or how it can be preserved.

The ideas of liberty cannot be taken for granted. Every generation must encounter them, examine them, and decide whether to carry them forward.

FEE works to make those ideas familiar, credible, and compelling to the rising generation. Through classrooms, seminars, student programs, digital education, and transformative experiences, we help people develop the knowledge and confidence to think for themselves and build flourishing lives and communities.

From First Encounter to Lifelong Leadership

Discover

A young person encounters an idea that challenges what they thought they knew.

Learn

They develop a deeper understanding of economics, ethics, and the institutions of a free society.

Experience

They meet others who share their curiosity and encounter ideas in transformative settings.

Lead

They carry those ideas into their classrooms, careers, communities, and institutions.

Connect

They become part of a lifelong network of people working to strengthen a free society.

Your legacy can help ensure that the next generation inherits not only the wealth of a free society, but the understanding required to preserve it.

WAYS TO CREATE YOUR LEGACY

This summary of planned giving vehicles is not intended as financial or legal advice, but we hope you find it a useful overview.

Gifts from Your Will or Trust

A bequest is one of the simplest ways to make a lasting gift to FEE.

You can designate FEE to receive a specific amount, particular assets, a percentage of your estate, or what remains after other beneficiaries have been provided for. If you already have a will or living trust, you may be able to add FEE without rewriting your entire estate plan. Ask your attorney about the option that is right for you.

Your gift can be structured to complement the needs of your family while creating a lasting legacy of economic education.

Appreciated Securities

Stocks, bonds, and mutual funds that have increased in value may be highly tax-efficient charitable gifts. When you give appreciated securities directly to FEE, you may avoid capital-gains tax on the appreciation while potentially receiving a charitable deduction, subject to applicable IRS limits.

These gifts can make an immediate impact and can also be part of a broader legacy strategy you enact with your financial advisor or attorney.

Retirement Accounts

IRAs, 401(k)s, and other retirement accounts can be powerful tools for charitable giving. Because retirement accounts have separate beneficiary designations, you can name FEE as a beneficiary without changing your will.

You may also be eligible to make a Qualified Charitable Distribution directly from an IRA to FEE during your lifetime. Talk with your financial or tax advisor about which option best fits your circumstances.



OTHER WAYS TO GIVE

Life Insurance

A life insurance policy that is no longer needed for its original purpose may offer an opportunity to create a charitable legacy.

You may name FEE as a beneficiary of an existing policy or, in some circumstances, transfer ownership of a policy to FEE.

Donor-Advised Funds

A donor-advised fund can provide a flexible way to manage charitable giving during your lifetime and as part of your long-term philanthropic plans. You may be able to name a DAF as a beneficiary and recommend grants to FEE and other organizations over time.

FEE works with donor-advised fund providers including DonorsTrust, National Christian Foundation, and Bradley Impact Fund, among others.

DonorsTrust

National Christian FOUNDATION®

BRADLEY IMPACT FUND®

Gifts that provide income

Charitable Gift Annuities

A charitable gift annuity allows you to make a gift to FEE while receiving fixed payments for life.

Depending on your circumstances, a gift annuity may provide:

- A charitable tax deduction
- Potential tax benefits when funded with appreciated assets
- A reliable stream of income
- A lasting charitable legacy

Gift annuities may be particularly attractive to donors age 65 and older and for gifts of $25,000 or more. Charitable gift annuities may not be available to residents of all states; please confirm availability in your state before proceeding.

Charitable Remainder Trusts

A charitable remainder trust can allow you to contribute appreciated assets, receive income for yourself or other beneficiaries, and ultimately benefit FEE.

Depending on the structure, a charitable remainder trust may provide:

- An income stream for one or more beneficiaries
- A potential charitable tax deduction
- Potential tax benefits when appreciated assets are contributed
- A future gift to FEE

Because these arrangements are more complex, they require careful planning with your legal and financial advisors.

YOUR LEGACY IN ACTION

One Idea Can Change a Life

The impact of an idea is measured in what people do with it:



The impact of FEE is ultimately measured in people.

For 80 years, people have encountered FEE at moments when a new idea could change the direction of their lives. Your legacy can help make those encounters possible for generations to come.

"FEE gave me a language for something I already felt: freedom isn't just a policy preference—it's a way of seeing other people. My dad's family story (leaving Poland for the United States) made 'freedom' personal early on, not abstract. It showed me that unlimited government power doesn't merely distort markets; it constricts imagination, opportunity, and even the everyday texture of life.

What FEE added was a coherent freedom philosophy that connects economics to character. It taught me to notice how voluntary cooperation—trade, entrepreneurship, civil society—lets strangers become partners in creating value, trust, and mutual respect. That frame changes how you move through the world: you start looking for the human story behind even ordinary exchange, and you grow more humble about how much coordination and creativity is packed into 'normal' life.

It also sharpened my moral instincts. FEE pushed me to take the 'seen and unseen' seriously—not only in dollars, but in relationships and social capital. That lesson has shaped how I think about everything from public crises to the choices we make in our families, workplaces, and communities. It's one reason I've come to believe that the most durable progress comes from personal responsibility and leadership by people of good will—not from grand plans imposed from above."

–Richard Lorenc, FEE program alumnus

JOIN THE LEONARD E. READ LEGACY SOCIETY

Carry an Inheritance of Freedom Forward

Leonard E. Read believed that when people were given the opportunity to encounter the ideas of liberty and think them through for themselves, they could change the world.

The Leonard E. Read Legacy Society honors those who choose to carry that work into the future.

By including FEE in your estate plans, you help ensure that future generations encounter the enduring ideas that make freedom and prosperity possible.





We would be honored to welcome you to the Leonard E. Read Legacy Society.

Your Next Step

Before making changes to your estate plan, we strongly encourage you to consult your financial advisor and/or legal counsel.

For more information about including FEE in your estate plans or joining the Leonard E. Read Legacy Society, please contact:



Anthony Rosario
Senior Major Gifts Officer
(404) 554-9980
arosario@FEE.org

Disclosure Statement

A copy of the Foundation for Economic Education (FEE)'s financial statements may be obtained by contacting us at: 1776 Peachtree St. NW, Suite 710S, Atlanta, Georgia 30309, FEE.org, or (404) 554-9980. FEE was formed in the state of New York for the purpose of economic education. Residents of the following states may obtain a copy of our financial and additional information as stated below:

FLORIDA: A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION FOR FEE, MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING 800-435-7352 OR VISITING THEIR WEBSITE WWW.FLORIDACONSUMERHELP.COM. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

Georgia: A full and fair description of the programs and financial statement summary of FEE is available upon request at the office and phone number indicated above.

Maryland: Documents and information submitted under the Maryland Solicitations Act are also available, for the cost of postage and copies, from the Secretary of State, State House, Annapolis, MD 21401 (410-974-5534).

Michigan: MICS No.51064.

Mississippi: The official registration and financial information of FEE may be obtained from the Mississippi Secretary of State's office by calling 888-236-6167. Registration by the Secretary of State does not imply endorsement.

NEW JERSEY: INFORMATION FILED WITH THE ATTORNEY GENERAL CONCERNING THIS CHARITABLE SOLICITATION AND THE PERCENTAGE OF CONTRIBUTIONS RECEIVED BY THE CHARITY DURING THE LAST REPORTING PERIOD THAT WERE DEDICATED TO THE CHARITABLE PURPOSE MAY BE OBTAINED FROM THE ATTORNEY GENERAL OF THE STATE OF NEW JERSEY BY CALLING 973-504-6215 AND IS AVAILABLE ON THE INTERNET AT HTTP://WWW.STATE.NJ.US/LPS/CA/CHARFRM.HTM. REGISTRATION WITH THE ATTORNEY GENERAL DOES NOT IMPLY ENDORSEMENT.

New York: Upon request, a copy of the latest annual report can be obtained from the organization or from the Office of the Attorney General at www.charitiesnys.com, by phone (212-416-8401) or by writing to the Charities Bureau at 120 Broadway, New York, NY 10271.

North Carolina: Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 888-830-4989 or 919-807-2214. The license is not an endorsement by the state.

Pennsylvania: The official registration and financial information of FEE may be obtained from the Pennsylvania Department of State by calling 800-732-0999. Registration does not imply endorsement.

Virginia: Financial statements are available from the Department of Agriculture and Consumer Services, 102 Governor St., Richmond, VA 23219.

Washington: FEE is registered with Washington State's Charities Program as required by law, and additional information is available by calling 800-332-4483 or visiting www.sos.wa.gov/charities, or on file at Charities Division, Office of the Secretary of State, State of Washington, Olympia, WA 98504.

West Virginia: Residents may obtain a summary of the registration and financial documents from: Secretary of State, State Capitol, Charleston, WV 25305. Registration does not imply endorsement.

U.S. RESIDENTS: 100% of your contributions may be eligible for a tax deduction in accordance with applicable law. Registration in a state does not imply endorsement, approval, or recommendation by the state.

Wisconsin: A financial statement of the charitable organization disclosing assets, liabilities, fund balances, revenue, and expenses for the preceding fiscal year will be provided to any person upon request.

U.S. RESIDENTS: 100% OF YOUR CONTRIBUTIONS MAY BE ELIGIBLE FOR A TAX DEDUCTION IN ACCORDANCE WITH APPLICABLE LAW.

REGISTRATION IN A STATE DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION OF FEE BY THE STATE.





"The solution to this problem must take a positive form: the restoration of faith in what free men can accomplish."

- Leonard E. Read,
Founder and first president of FEE

The Foundation for Economic Education has spent 80 years helping people understand the ideas that make freedom and prosperity possible.

Material wealth is one inheritance. The knowledge of how to create, preserve, and build upon it is another.

With your help, we can pass that inheritance to the next generation.

1776 Peachtree St. NW Suite 710S Atlanta, GA 30309 | FEE.org | (404) 554-9980
The Foundation for Economic Education is a 501(c)(3) tax-exempt public charity. EIN:13-6006960