SURFRIDER
Large Uptick in Mission Impact

To set the stage for our 2012 results, let us offer some context. Between 2006 and 2011, our annual average of coastal victories (defined as a decision made in favor of the coastal and ocean environment that results in a positive conservation outcome, improves coastal access, or both) was 28. This means that during those five years, with the 2008-2009 recession occurring in the middle of that period, our domestic chapters averaged 28 victories.

In 2012, our domestic chapter network achieved 43 coastal wins, more than a 50 percent increase in wins over the previous six-year average.

2012 was a stunning year for coastal victories.

This quantifiable figure allows you to “see” the impact that Surfrider Foundation is making toward our mission: the protection and enjoyment of oceans, waves and beaches through a powerful activist network. A complete list of these wins can be found at Surfrider.org/wins. We encourage you to visit this page and spend a few minutes viewing our achievements.

We recognize that some coastal victories are years in the making. That’s why we took steps in 2012 to analyze and to ensure that the infrastructure for our network remains capable to efficiently support the activities of the chapters and our members. We understand that teaming top-notch technical and tactical expertise with local knowledge and experience is fundamental to future coastal victories.

Our success is related to all the elements that make up Surfrider Foundation: the power of our brand in coastal communities, the massive reach of our network, the credible citizens that stand up for local issues in coastal communities, and the hundreds of thousands who engage with us every month through social media. Our network runs deep, spans wide and points in one direction: coastal preservation.

For our oceans, waves and beaches,
WAYS
OF GIVING

We hope the information provided below will be helpful as you consider making a contribution to the Surfrider Foundation while possibly receiving tax and financial benefits.

Current Gifts

Cash
A gift of cash is the simplest and most popular gift to the Surfrider Foundation. It provides immediate support for our mission-related work and gives the donor a charitable income tax deduction in the year of the gift.

Securities
Gifts of appreciated securities are an excellent vehicle for giving to Surfrider. If you have appreciated securities that you have owned for more than one year, you may want to consider using such an asset to make charitable gifts. When a gift of long-term appreciated securities (securities held for more than a year) is made directly to Surfrider, there is no tax on your capital gains, even though the gain is counted as part of your charitable deduction. To receive the greatest tax benefit, gifts of appreciated securities should be made directly to Surfrider, rather than selling them first and making a donation of the proceeds (you would then have to pay tax on the gains).

If your gift of appreciated stock, combined with other gifts, exceeds 30% of your adjusted gross income—the maximum deduction allowed for most appreciated securities gifts—the excess might be carried forward for five additional years. The value of the gift is based on the date the transfer of shares is complete.

Future Gifts
In addition to these current gifts, individuals may make contributions to Surfrider Foundation through one or more of the following planned giving opportunities. Maximizing your gift and participating in planned giving are wonderful, strategic ways to leave the legacy of a healthy ocean environment and help secure the work of Surfrider Foundation into the future.

We would be happy to show you the potential benefits to you and/or your heirs of a planned gift supporting our efforts. Such a consultation creates absolutely no obligation on your part and all information is completely confidential.

Individual Retirement Account (IRA)
Naming Surfrider Foundation as a beneficiary of your IRA is a very tax-efficient way to make a charitable gift. In fact, retirement plans and IRAs should be the first asset considered in planned giving. This is because retirement funds have never been taxed. So, when you make a withdrawal from your IRA or retirement plan, you must pay taxes on it as ordinary income. At your death, whatever remains in these plans does not escape taxes and is actually subject to both income tax and estate tax. In the highest estate tax bracket, this could reduce the value of your retirement funds by 70% or more! Making a gift via your IRA or retirement plan is simple to do and can be changed if your financial or estate plans change.

Life Insurance
Naming Surfrider Foundation as a beneficiary of your life insurance is a simple way to provide support without giving up current assets. You may also create a new policy or transfer ownership of your existing life insurance policy to Surfrider Foundation and receive an immediate charitable gift deduction. If you continue making premium payments to maintain the policy, those payments are tax deductible.

Bequests
You can establish a legacy that will reflect your commitment to the coastal environment by including the Surfrider Foundation in your will or living trust. Bequests to Surfrider are generally exempt from federal or state inheritance taxes, and subject to an unlimited deduction.

The simplest way is to add any of the following to your will or living trust:

Percentage: I give the Surfrider Foundation Global Office, located in San Clemente, California, ___% of the residue of my estate (for the support of ______ program) or (to establish the ______ fund) or (for its general purposes).

Dollar Amount: I give to the Surfrider Foundation Global Office, located in San Clemente, California, $_______ (for the support of ______ program) or (to establish the ______ fund) or (for its general purposes).
Specific Property: I give to the Surfrider Foundation Global Office, located in San Clemente, California, my interest in [describe the property and the exact location] (for the support of [program] or [for its general purposes]).

Please consult with us, and your financial and tax advisors in selecting a program or specific target for such a bequest.

Charitable Remainder Trusts (CRT)
A charitable remainder trust can be used to bypass capital gains taxes on the sale of highly appreciated assets, generate an increase in income, receive a charitable income tax deduction, and help you fulfill your philanthropic objectives. Typically, property or money is donated to Surfrider, but you, the donor, continue to use the property and/or receive income from it while living. The beneficiaries receive the income and Surfrider receives the principal after a specified period of time. You avoid any capital gains tax on the donated assets, and you receive an income tax deduction in the year the trust is created. In addition, the donated asset(s) are removed from the estate, reducing subsequent estate taxes. While this contribution is irrevocable, you may have some control over the way the assets are invested, and may even switch from one charity to another (as long as it’s still a qualified charitable organization). CRTs come in two main types: charitable remainder annuity trust (which pays a fixed dollar amount annually) and a charitable remainder unitrust (which pays a fixed percentage of the trust’s value annually).

Charitable Lead Trust
Some individuals would like to have use of their gift now, while reserving benefits from the gift for family members for later. Charitable lead trusts are essentially the opposite of Charitable Remainder Trusts. In this type of gift, a donor contributes property to an irrevocable trust. The trustee pays an income to the charity for the donor’s lifetime or a specified time period. At the end of the term, the trust property is distributed either back to the donor or to the donor’s heirs. The primary advantage of this arrangement is that the property contributed to the lead trust is valued for estate and gift-tax purposes as of the date of the contribution. For assets that are likely to appreciate in value over time, a donor may wish to remove it from their estate now by contributing it to a lead trust.

Charitable Gift Annuity (CGA)
With a charitable gift annuity you, the donor, will receive fixed payments, based on your age, for the rest of your life. These payments are partially tax-free, plus you will receive an immediate tax deduction in the year you fund the annuity. If you create your annuity with appreciated assets, you will also avoid immediate capital gains taxes. When the annuity matures, the remainder passes to Surfrider Foundation. The minimum age for an immediate CGA is 55. Others may consider a deferred CGA.

Other Giving Options
Workplace Giving
The Surfrider Foundation is a member of EarthShare, a nationwide network of the most respected environmental and conservation organizations. EarthShare partners with employees and employers across the country to support hundreds of environmental groups through efficient and effective payroll deduction giving and offers a simple way to care for the environment.

Workplace giving is probably the easiest way to make a charitable gift. If your company offers an EarthShare workplace-giving program, you can choose an amount that you wish to have deducted from your paycheck each pay period. These payroll deductions are fully tax deductible and take place automatically.

Through EarthShare’s workplace giving programs, you can elect to contribute only to the Surfrider Foundation or you can donate to all of the environmental and conservation charities you normally support by designating them in your EarthShare gift. Federal employees and military personnel can get involved too. Each year the US government offers its employees the chance to participate in the Combined Federal Campaign (CFC). [Surfrider’s CFC code is 10642] EarthShare is a part of many state and municipal government agencies’ giving programs as well.

If EarthShare is not offered in your campaign, or if there is no campaign at your workplace, you can help us introduce the program to your employer.

Employer Matching Contributions
Many employers sponsor matching gift programs and will match any charitable contributions made by their employees. Some corporations set aside millions of dollars for matching gifts each year and only a small portion of the funds are ever used. Most companies match dollar for dollar, and some will even double or triple match your gift. To find out if your company offers gift matching, please contact your human resources department.

Tributes and Memorials
Honor someone’s accomplishment or memory, celebrate a friend’s birthday or recognize an individual’s achievement with a tribute or memorial to Surfrider Foundation. Tribute or memorial acknowledgement cards are sent directly to the recipient to recognize your gift in their honor. You receive a letter for tax purposes and honor a friend while supporting Surfrider at the same time.
Are you a lifetime member?

Lifetime Members are those who have drawn a line in the sand and made a lifelong commitment to Surfrider Foundation’s mission: the protection and enjoyment of our oceans, waves and beaches.

Become one today by calling our Membership Department or by visiting www.surfrider.org/join

Your Lifetime Membership includes a subscription to our monthly digital newsletter, Making Waves, a Lifetime Membership sticker, a membership t-shirt and an annual appreciation gift. Your initial sign-up will also include a reusable tote, a license plate frame, and a hooded sweatshirt.

And if you become a Lifetime Member before January 1, 2014, we’ll send you Pipeline, a beautiful coffee table book all about the world-famous break on Oahu’s North Shore.
DONORS

On behalf of the world’s oceans, waves and beaches, the Surfrider Foundation would like to thank the following individuals, foundations and corporations for their generous support received between January and December 2012.

$400,000+

- Billabong USA
- The Campbell Foundation
- The Harder Foundation
- KROQ
- Mathewson Charitable Lead Trust III
- The McBeth Foundation
- Meyer Memorial Trust
- The Offield Family Foundation
- Randy Renick & Rick Saveri
- Resources Legacy Fund Foundation
- Volkswagen Group of America, Inc.
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- Barefoot Wine
- EarthShare
- The Estate of James Emil Franco
- $25,000-$49,999
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- Aveda
- California Department of Fish and Game
- The Forrest & Frances Lattner Foundation
- The Marisla Foundation
- The David & Lucille Packard Foundation
- SIMA Environmental Fund
- $50,000-$99,999
- Alacer Corp./Emergen-C
- Paul M. Angell Family Foundation
- The Barkley Fund
- EarthShare of California
- Marisla Fund of the Hawaii Community Foundation
- Network for Good
- Omidyar Ohana Fund
- Pacific States Marine Fisheries Commission
- PBteen & PBdorm Brand Marketing
- Sarah & Matthew Pincus Foundation
- Judith Posnikoff
- $10,000-$24,999
- Anonymous
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- Dancing Tides Foundation
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- Envirosax USA
- Pacífico
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Legacy Circle Donors

The Legacy Circle recognizes and honors those who have included Surfrider Foundation in their plans. They have done so by naming Surfrider as a beneficiary to wills, living trusts, IRAs, life insurance and other life-income gifts or who have made an outright gift to the Surfrider Foundation Endowment Fund.

If you qualify for membership in the Legacy Circle or for more information about planned giving, please contact Surfrider Foundation’s Director of Development.

We thank those who notified us in 2012 of their planned giving, enabling us to protect the world’s oceans, waves and beaches in the future.

Stan Hymel

Work Place Contributions

Surfrider Foundation thanks those individuals who have supported our work through payroll deduction via EarthShare. For further information about adding an environmental option to your company’s workplace giving campaign, please visit www.earthsare.org
The impact Surfrider Foundation is making toward our mission - the protection and enjoyment of oceans, waves and beaches through a powerful activist network - is increasing each year due to the financial support of our members, granting foundations and cause marketing partners. The year 2012 saw an increase in the pace and scope of the coastal victories won by the Surfrider Foundation. These victories do not happen without your financial support and we thank you for your largesse.

I am happy to report that our balance sheet tells us we continue to be in solid financial shape. We have invested your contributions wisely and have continued to build our revenue streams to support our critical mission. Our staff has done an outstanding job managing the resources of the Foundation and continues to pursue excellence in every aspect of our business. More and more people are donating their dollars and efforts thereby confirming the relevance of our mission and its importance in people’s lives around our country and around our world.

When your financial contributions are leveraged with the donated time of our volunteers, we continue to deliver outstanding results by putting 85 cents of every dollar to work directly on what matters most: our beaches, waves and water quality. Please take a few minutes to congratulate yourself for being an integral part of our success by visiting Surfrider.org/wins. Jumping from an average of 28 coastal victories to 43 in 2012 is an outstanding result and we share that result with you, our financial supporters.

Your donation to Surfrider Foundation is an investment in the future ocean environment of our planet. Our best work is yet to come and we are counting on your continued financial support. Please accept my personal thanks for your generosity and my invitation to continue to invest in the future of the Surfrider Foundation.

For the oceans, waves and beaches,

Christopher W. Keys, CPA
Chief Financial Officer

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**LETTER FROM THE CFO**

Annual Report Message, Year 2012
Christopher W. Keys, CPA, Chief Financial Officer Surfrider Foundation

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With federal capital gains taxes now set at 25% and with the Medicare surcharge on capital gains at 3.8%, almost 30% of the value of your appreciated asset will be lost to the U.S. Government. In addition, many states have their own capital gains taxes - for example, in California, the rate is currently 15% - so depending on where you live, you could lose nearly half the value of your asset.

To learn more about donating appreciated assets, such as stock, to the Surfrider Foundation, please contact Steve Blank, our Director of Development at (949) 492-8170 x416 or sblank@surfrider.org.

* Per Audited Financial Statements