

ANNUAL

SURFRIDER  
FOUNDATION

REPORT

2009



# CEO/CHAIR OF BOARD LETTER

All of us had formative experiences with money. It's those early experiences that shaped the way we look at, understand and prioritize the role of money in our later years.

When I was a kid my dad had a subscription to Forbes. He rarely pointed to articles or even suggested it offered interesting reading. Yet, over time I started to read the magazine and then moved on to reading the Wall Street Journal. These habits shaped my perspective on money and investing. Two lessons I learned during those years still apply today.

First. Money is a tool.

Second. Investors want returns.

The fact that this is an annual report for a non-profit organization should not, in any way, suggest that those two "truths" don't apply.

Money IS a tool and it is a tool here at Surfrider Foundation. That said, due to our market strategy, it's not the most important tool in terms of defining our success.

Our organization is wonderfully positioned for this era. We started just over 25 years ago and based our business model on leveraging volunteerism. We were crowd-sourcing four years before the invention of the Internet (which happened in 1989). Our choice, to connect coastal people to their local environs and to promote coastal stewardship, enables us to leverage \$1 to act more like \$10. Today, we not only have more than 300,000 people connected to us on social networks, we have something very real to connect them to. Social networks are powerful, but when wedded with real, physical networks of people emotionally tied to their local coasts the combination is potent.

CJ Olivares  
Chair, Board of Directors



Our domestic network now has 73 chapters and we've grown to have a presence in more than a dozen countries. Notably, this network has grown organically (we don't plant chapters) and our primary investments at Surfrider are focused on maximizing the network's effectiveness.

This brings me to the second lesson.

We know that you have many alternatives when deciding where to invest your dollars. Our philosophy is that when we take a dollar we must deliver the absolute strongest return possible AND that return must be easy to understand. An over-simplified version of our accomplishments in the past few years can be found here: [www.surfrider.org/wins](http://www.surfrider.org/wins). It's a list of our recent victories. If you do nothing else, please go to this list. You'll see my two points reflected in it. Money IS a tool and we have invested it in driving these real, local victories.

Beyond these messages I also want you to know that Surfrider is in excellent shape. We have exceeded our financial goals during these last few challenging years. We've been awarded, for the second year in a row, a four star rating by Charity Navigator (only 19% of non-profits can state this). These are the reasons you should feel like we're a credible and trustworthy place to invest. Yet the reason you should invest in us goes beyond these points.

You should invest in Surfrider Foundation because we see a dollar as a tool, which can be amplified via our volunteer network ... and yield real, meaningful victories toward the protection of our coastlines.

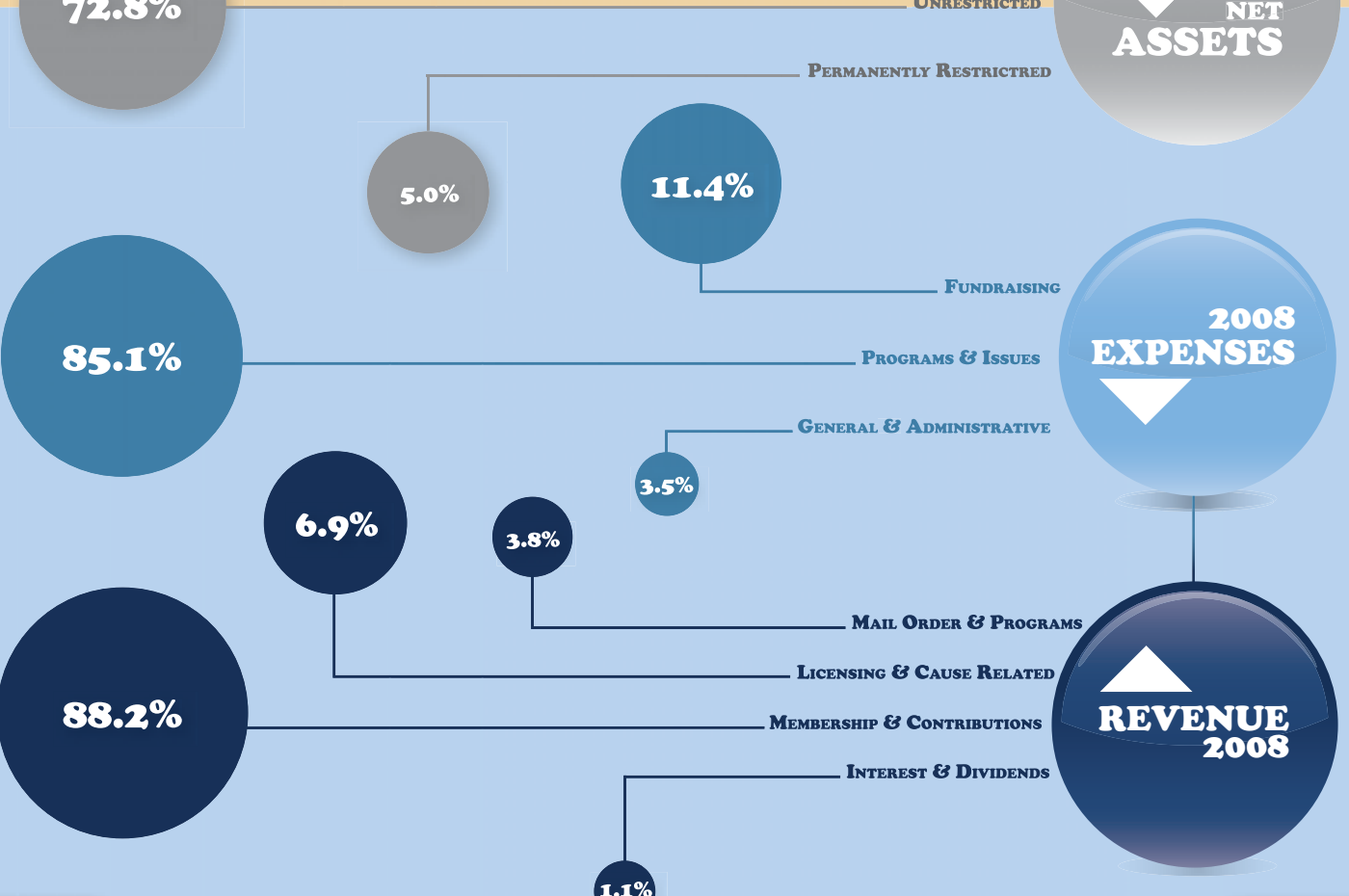
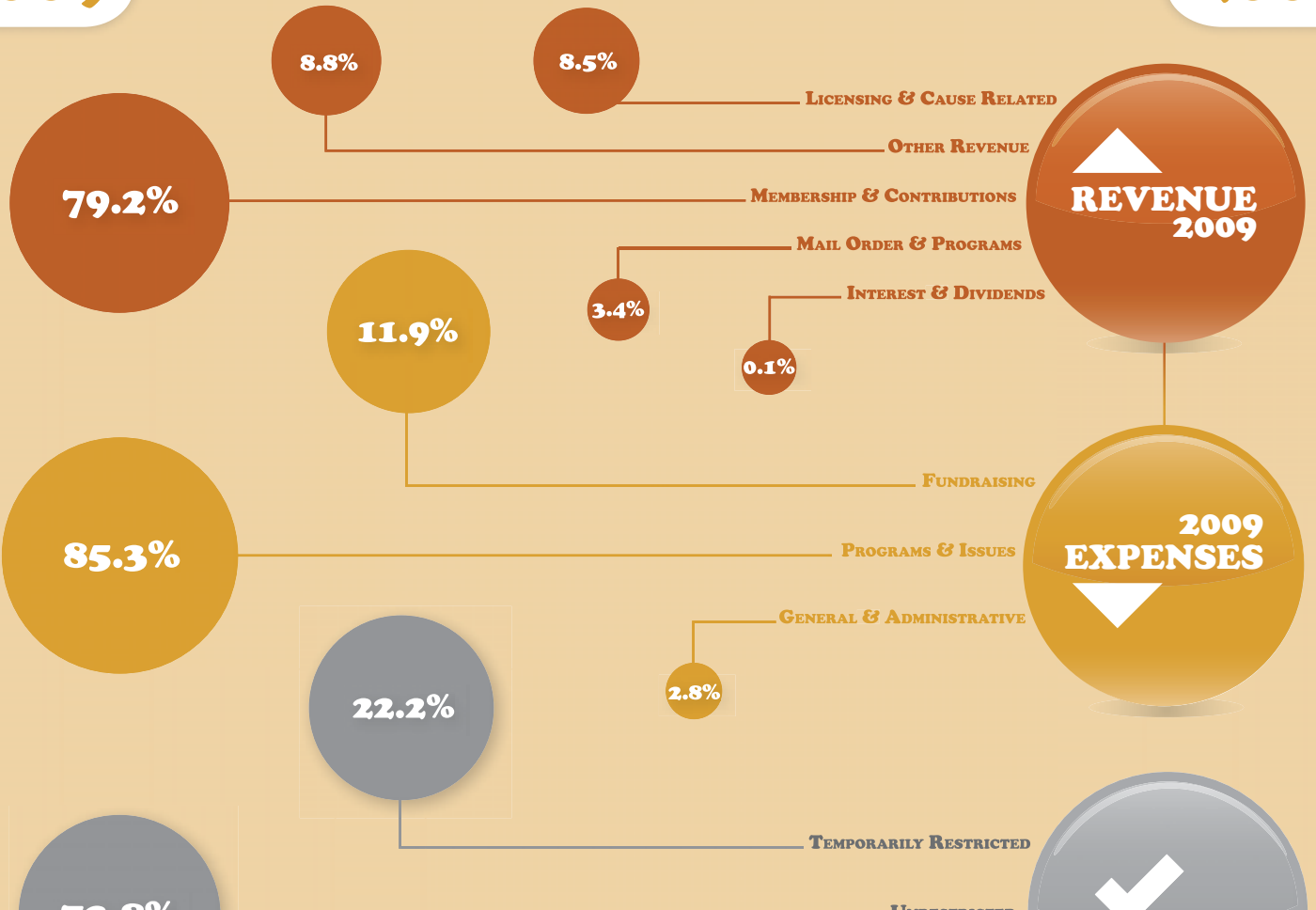
Thank you for your time, connection to our mission and your continued investment in our network.

Jim Moriarty  
CEO, Surfrider Foundation



2009

2009



2008

2008

# HIGHLIGHTS AND VICTORIES

Surfrider Foundation kicked off 2009 by solidifying events to take place throughout the year in celebration of the organization's 25th Anniversary. Since 1984, when the organization was only a small group of surfers fighting a beach alteration project that threatened their break in Malibu, California, the Surfrider Foundation has grown in leaps and bounds to encompass over 50,000 members and 90 grassroots chapters worldwide.

Additionally during our 25th anniversary year, the Surfrider Foundation achieved 20 coastal victories; a great step forward in achieving the vision of 150 coastal victories by 2010. These victories can be defined as a decision made in favor of the coastal and ocean environment that results in a positive conservation outcome, improves coastal health, or both. Surfrider Foundation continued throughout our 25th anniversary year to grow in other ways as well.

Summer found the Surfrider Foundation and CardPartner, Inc. joining forces to launch the Surfrider Foundation Visa Platinum® Rewards credit card. For every card activated, the Surfrider Foundation receives \$50, and following the activation, a percentage of all purchases. At the same time, Surfrider also joined forces with Tempo Payments to offer a MasterCard debit card that can be assigned to a holder's existing bank account and pays a percentage of every purchase to the Foundation as well.



## SWELL.COM



As we transitioned into the holiday season, Swell.com, the premier online surf retailer partnered with Surfrider Foundation for the re-launch and re-design of Surfrider's online store. The new retail portal, launched on November 2nd, is hosted and managed by Swell, and aims to increase exposure of Surfrider's brand merchandise and raise awareness of the Foundation's mission to protect and preserve our coastlines. In addition, Swell will provide marketing support through their popular catalog and website.



Photos courtesy LPA Inc./Costea Photography

In August, the Surfrider Foundation's global headquarters, designed by Irvine-based LPA Inc., was awarded LEED®-CI gold certification by the U.S. Green Building Council (USGBC). LEED is the USGBC's rating system for designing and constructing the world's greenest, most energy efficient, and high performing buildings. With this LEED-CI gold certification, the Surfrider Foundation's global headquarters becomes the first building in San Clemente, and the second in all of Orange County, to earn this honor.



The Surfrider Foundation concluded its 25th Anniversary year with a star-studded gala on October 9th at the California Science Center in Los Angeles. A host of activists, surfers and celebrities came together to celebrate a quarter century of coastal preservation and raised over \$150,000 for the Foundation's continued work to protect our coastlines.



The evening began with the presentation of the Surfrider Foundation's Art For The Oceans III. The auction, which featured twenty-five original works by a host of contemporary artists including Shepard Fairey, Raymond Pettibon, Thomas Campbell and Billy Al Bengston, raised nearly \$100,000 for the Foundation.



Mark Hoppus from Blink-182 then took over on the mic to emcee the presentation of the Surfrider Foundation's Keeper of the Coast awards. This year's honorees included actor David Chokachi, Incubus and Pearl Jam, who have all made significant contributions toward helping the Surfrider Foundation fulfill its mission.



The evening concluded with a rocking performance by Camp Freddy. Joining core members Dave Navarro, Billy Morrison, Matt Sorum, Donovan Leitch and Chris Chaney on stage were Sum-41's Deryck Whibley, Evan Seinfeld from Biohazard, Sugar Ray's Mark McGrath, and 2004 Keeper of the Coast recipient Perry Farrell, who brought the house down with an amazing rendition of Led Zepplin's "Whole Lotta Love."



Images Left to Right, Top to Bottom: 1. Perry Farrell, Photo:Lishok, 2. The Stage, 3. David Chokachi accepting his award Photo:Lishok, 4. Brandon Boyd and Ben Kenney of Incubus. Photo:Lishok, 5. Keeper of the Coast recipients Brandon, and David with CEO Jim Moriarty Photo:Lishok, 6. Shepard Fairey: Jaws Wave, 7. Melinda Morey: Restaurants-Bula Bulion, 8. Andy Davis: Kirra, 9. David Carson: Teahupoo

# VICTORIES 2009



photo: CSULB/College of Natural Sciences and Math

**January** – South Bay Chapter – California – Massive Playa Vista Development Stopped. Surfrider Foundation’s South Bay Chapter, along with their partners Ballona Wetlands Land Trust and the City of Santa Monica, signed a settlement agreement that sent the controversial Phase 2 of the development back to the drawing board.

**February** – Monterey County Chapter – California – Polystyrene Banned in Monterey. The City of Monterey follows Carmel and Pacific Grove in passing this important ordinance to help alleviate the amount of marine debris entering our coastal waters. With Monterey subjected to vociferous opposition from the American Chemistry Council, the City Staff was compelled to write a Negative Declaration addressing the California Environmental Quality Act. Throughout the process the Monterey Chapter was instrumental in garnering community and business support, addressing the myriad issues which City Staff had questions about, and amassing a strong coalition of 18 community and environmental organizations to support the ordinance. City residents were resoundingly in favor of the switch to recyclable and compostable alternatives, and the city council’s vote was unanimous.

**March** – Surfrider Foundation – Washington – Washington State Year-Round Rescue Tug. On March 24th, Washington State Governor Chris Gregoire signed a measure that requires shippers, tankers and other large vessels to pay for a year-round rescue tug at Neah Bay. The tug aids ships in danger of spilling oil, forming a strong defensive line against oil spills in the Strait of Juan de Fuca and on Washington’s outer coast.

– Santa Cruz Chapter – California – Watsonville Bans Styrofoam Food Containers - Last in County

The Santa Cruz Chapter was excited to announce approval of a ban on styrofoam food containers in Watsonville. All jurisdictions in Santa Cruz County now have polystyrene food container take-out bans in place, banning the use of foam take-out containers in businesses selling food for immediate consumption, such as restaurants, ice-cream parlors and coffee shops, making Santa Cruz County the first and only multiple-jurisdiction county in California to have a styro-ban in all jurisdictions within the county limits.

**April** – New York City Chapter – New York – New York Passes Bigger Better Bottle Bill

Environmental groups throughout New York successfully passed the Bigger Better Bottle Bill as part of the 2009-10 state budget. This momentous achievement is the first major overhaul of the state’s bottle deposit law since it was created in 1982, and caps a grueling nine-year campaign to expand and update the law to include water bottles, which comprise nearly a quarter of all beverages sold in New York. The law also requires beverage companies to return 80 percent of the unclaimed bottle and can deposits to the State, generating upward of \$115 million annually for the General Fund.

– Santa Barbara County Chapter – California – Judge Invalidates Water District Annexation of Gaviota Coast Lots

A lawsuit filed by the Gaviota Coast Conservancy and Surfrider Foundation resulted in a decision invalidating a 2008 action by the Local Agency Formation Commission (LAFCO) annexing prime Gaviota Coast parcels into the Goleta Water District. Without water service, development of the lots is more challenging.

**May** – Suncoast Chapter – Florida – Suncoast Chapter “POWW” Waterfront Preservation. The chapter was involved with the POWW Coalition (Preserve Our Wallets and Waterfront) to preserve both waterfront parks and habitat and taxpayer dollars from the Tampa Devil Rays’ proposed development of an open-air stadium in downtown St. Petersburg. The area has now been protected as a designated city park.

– North Coast Organizing Committee – Oregon -- Save Arcadia Beach State Park

As part of a land acquisition transaction, the eastern property of Arcadia Beach State Park was traded to an individual. The land that was in the park is now zoned for both ‘Recreational Management’ and ‘Agriculture-Forestry’ – zoning that would still place limits on the development of a subdivision on this property. The individual that acquired the property petitioned Clatsop County to rezone all of the former Arcadia State Park land to ‘Residential Agricultural 2.’ This would have allowed a subdivision on the property.

**June** – Washington DC Chapter – Washington, DC – Anacostia River Cleanup and Protection Act Starting in January 2010, virtually every retailer in DC that sells food will charge 5 cents for each single-use paper and plastic bag distributed. Proceeds from the fee will create the Anacostia River Cleanup Fund, a dedicated trust to pay for restoration of one of the ten most polluted rivers in the country. The fund will also pay for an education campaign and reusable bags to be distributed for free to low-income and elderly residents.



photo: Galen Lawson

– Lake Michigan Chapter – Illinois – Surfing is Not a Crime in Chicago. After nine months of letters, emails, phone calls and meetings, activists from Surfrider Foundation’s Lake Michigan Chapter succeeded in making surfing officially legal at four beaches in the City of Chicago. From Memorial Day to Labor Day Montrose Beach and 57th St. Beach; From Labor Day to Memorial Day (off season) Montrose, 57th, Osterman and Rainbow Beaches are open to surfing at your own risk.



Photo: Mike Killion

– Seattle Chapter – Washington – Plastic Bags Banned in Edmonds, WA  
The Edmonds City Council approved a ban on plastic shopping bags following a successful campaign by the Seattle Chapter. The campaign received solid support from the community and local businesses.

**June** – Siuslaw Chapter – Oregon – Oregon Nutrient Reduction

Oregon State Legislature passed SB 631, which reduces the amount of phosphorus contained in automatic dish soap to no more than 0.5% by volume. Siuslaw Chapter Blue Water Task Force Coordinator Mark Chandler worked in Dunes City to pass the first phosphorus reduction ordinance in the State after seeing large algal blooms in Siltcoos and Woahink lakes that led to impacts on drinking water, recreational use, and aquatic health.

**July** – Surfrider Foundation – Oregon – Oregon Marine Reserves

The Oregon State Legislature voted to support HB 3013, which puts into practice the recommendations of the Ocean Policy Advisory Council (OPAC) to implement two marine reserves (Redfish Rocks in Port Orford and Otter Rock near Depoe Bay), as well as the further evaluation and collection of baseline biological, social, and economic information over the next 18 months for sites proposed off Cape Falcon, Cascade Head, Cape Perpetua and to support a proposal from the Coos County area. The bill also directs communities adjacent to the proposal areas to form teams composed of diverse and balanced stakeholders for the on-going collaborative efforts surrounding rule making, research, monitoring, and marine reserve implementation.

– Santa Barbara County Chapter – California – Goleta Beach Saved - Groin Defeated

On July 8, the California Coastal Commission overturned its staff’s recommendation and denied Santa Barbara County’s proposed groin project, which would have trapped sand at Goleta Beach, preventing it from reaching beaches to the east of Goleta, and causing erosion and damage to beach habitats.

**August** – Palm Beach County Chapter – Florida – Lake Worth Surf and Reefs Protected

In a landmark decision, Florida Judge Robert E. Meale ruled against the town of Palm Beach by denying the town a permit to dredge and fill 1.8 miles of beach surrounding the Lake Worth Pier with 700,000 cubic yards of poor-quality sediment.

**September** – Argentina Affiliate – Argentina – Stopped Seawall Construction at La Paloma/La Parena

Two pocket beaches with high-quality surf spots, at La Paloma and La Parena, were threatened with construction of massive seawalls in an attempt to protect a regional road. Surfrider Argentina partnered with local coastal scientists to demonstrate that construction of the seawalls was unnecessary and would have serious negative impacts on the beach and adjacent waves.

**October** – Kauai Chapter – Hawaii – Kauai Bans Plastic Shopping Bags

Following a two-year campaign, the island of Kauai in Hawaii banned the use of non-biodegradable plastic bags from retail stores on the island beginning January 11, 2011, the same day that Maui County’s plastic checkout bag ban goes into effect.

**November** – Curry County Organizing Committee – Oregon – Port Orford Stormwater Ordinance Strengthened

The City of Port Orford amended its stormwater ordinance to strengthen protections for water quality in both freshwater streams and the nearshore environment. Through a partnership that included the Surfrider Foundation, participants collaborated on research, public education, community outreach, and development of draft ordinance language.

– Texas Chapter Network – Texas - Texas Opens Its Beaches with a Constitutional Amendment

After an organized and integrated effort on behalf of the Texas Chapters to promote our beach access goals on a statewide level, the people of Texas passed a constitutional amendment through a statewide vote, sending a strong message to developers and politicians about open beach access, and supporting the Texas Open Beaches Act. The “Prop 9” amendment created a constitutional “right” to beach access and protects “the right of the public, individually and collectively, to access and use the public beaches bordering the seaward shore of the Gulf of Mexico.”

**December** – Washington DC Chapter – Washington, DC – Unused Pharmaceutical Safe Disposal Act

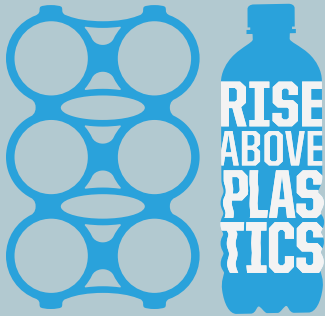
The D.C. Chapter campaigned for legislation passed by D.C. Council seeking to curb pharmaceutical drugs released into the District’s surface waters, by creating a disposal program for consumers.

# SURFRIDER PROGRAMS

Our greatest strength is our network of grassroots activist Chapters. These community-based Chapters build unity and power, enabling individuals to make a positive change in their community and protect our coastlines.

## Rise Above Plastics (RAP)

Two thousand and nine was a phenomenal year for the Surfrider Foundation's Rise Above Plastics program. The goal of the program is to reduce the impacts of single-use plastics on the marine environment by raising awareness about the dangers of plastic pollution and advocating for a reduction of single-use plastics and the recycling of all existing plastics. Under RAP, several Chapters around the world have developed educational programs to raise awareness in the local community regarding the impacts of plastic on our lives and our environment, including its accumulation and detriment to the ocean and the existence of the North Pacific Gyre. RAP activists also choose to advocate at city council meetings for local ordinances geared at reducing consumption of single-use plastics.



Since its formation, Surfrider Foundation chapters around the world have worked with their local communities not only to educate the public, but also to advocate for change. [www.riseaboveplastics.org](http://www.riseaboveplastics.org)

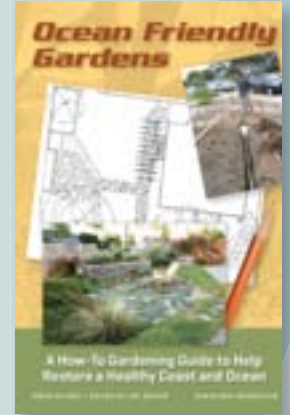
## Blue Water Task Force (BWTF)

The Blue Water Task Force is a volunteer water-quality monitoring, education and advocacy program utilized by our Chapters and members to alert citizens and officials in their communities about water-quality problems and to work toward solutions. Designed to take advantage of the daily presence of surfers and beachgoers in coastal waters, it is the Surfrider Foundation's most visible and successful program to-date.

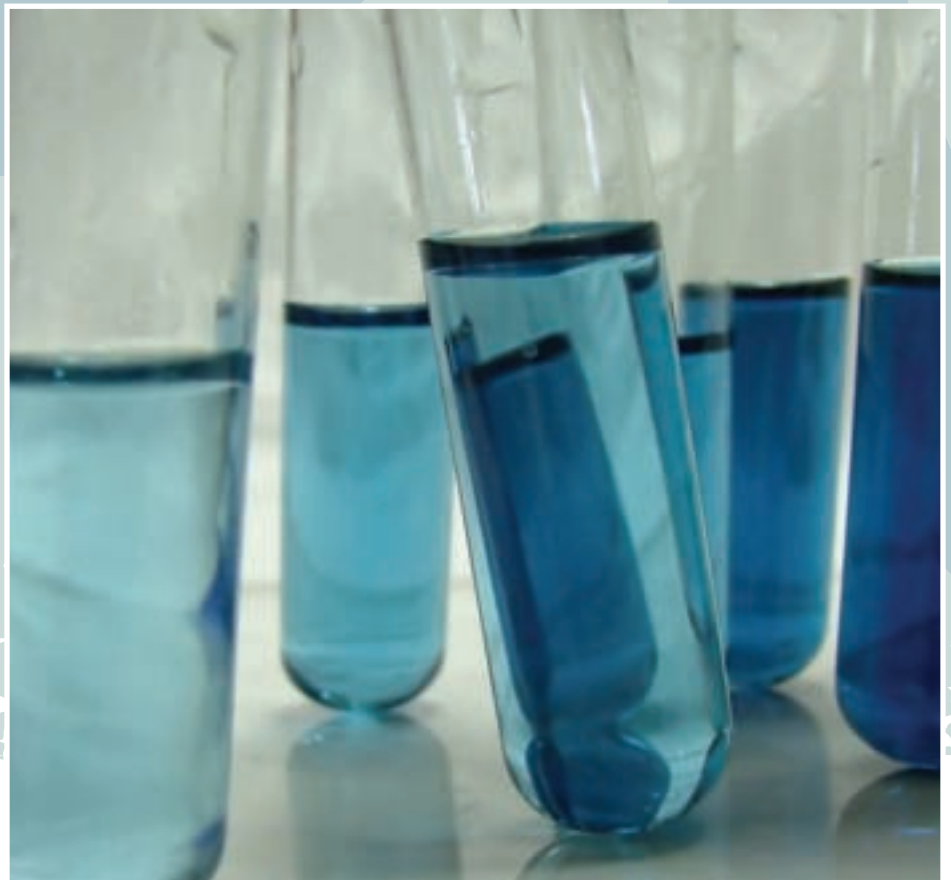
The BWTF program serves many purposes beyond providing a record of beach water-quality. The Chapters use the program to educate students about water-quality issues, and to promote a coastal stewardship ethic. The BWTF also provides an excellent volunteer activity. Many Chapters participate directly in agency beach-monitoring programs by collecting samples from beaches that are not normally covered, or during the off-season testing months. After using BWTF data to identify pollution problems, Chapters raise awareness of these issues in their communities, work with local governments to track the sources of pollution, and take action to clean up their watersheds.

## Ocean Friendly Gardens

Our Ocean Friendly Gardens program in Southern California is designed to help each and every one of us reduce the impact our yards have on coastal water quality. Runoff from residential landscapes affects the quality of our oceans and the quality of our lives. The sediment in the water reduces clarity; nutrients increase algae populations and red tides; bacteria close beaches; debris can choke and suffocate aquatic species; and pesticides used in landscaping can poison fish consumed by humans – all of which degrade the natural beauty of our oceans.



The good news is that you can help bring back healthy coasts and oceans through the Ocean Friendly Gardens program. The program is based on a simple CPR concept – Conservation, Permeability and Retention. It is a way for all of us to design and maintain our gardens so that we can reduce urban runoff – and the pollutants that go with it. [www.oceanfriendlygardens.org](http://www.oceanfriendlygardens.org)



## Respect The Beach (RTB)

Respect the Beach is a volunteer-driven, coastal-education program that includes field trips, classroom discussions, handouts, videos and hands-on projects designed to reflect current scientific information and a holistic approach to understanding coastal and ocean environments. Using a variety of learning formats, students can explore and deepen their understanding of many aspects of coastal environments, from the creation of sand to the complex ecological interactions that support life, to human influences on water quality in the oceans and throughout the watershed.

## State Of The Beach Report

The Surfrider Foundation published its tenth annual edition of the State of the Beach report in 2009 and has gone even more eco-friendly by publishing it strictly online, where the report is now continuously updated as new information becomes available, state policies change, and important developments in beach health occur in the 28 coastal states and territories now covered by the report. Designed to serve as the “go to guide” for researchers, coastal managers, legislators and activists, the report evaluates the public availability of state-level coastal information, and compares each state’s status on critical beach-health indicators. [www.surfrider.org/stateofthebeach](http://www.surfrider.org/stateofthebeach)

## Surfrider Foundation Action Network

With just a click of the mouse, activists can make their voices heard. Through the Action Network, the Surfrider Foundation mobilizes activists by email, inviting them to weigh in when it counts by sending a personalized message or petition to key policymakers – locally, nationally or around the world. A personalized letter is included simply by replying to said email or by clicking on the website. The Action Network does the rest, sending handcrafted email messages to elected officials, corporate leaders and other important decision makers.

## Surfrider Foundation Website

Surfrider Foundation maintains a comprehensive website: [www.surfrider.org](http://www.surfrider.org). The site provides visitors with an opportunity to keep abreast of current Surfrider Foundation issues, efforts and campaigns, and offers a wealth of environmental information on our nation’s coastal zones. Additionally, nearly all Surfrider Foundation Chapters maintain websites of their own, which enables them to post information on local issues and events. Chapter websites can be accessed directly through the Surfrider Foundation website at [www.surfrider.org/chapters](http://www.surfrider.org/chapters).

## Making Waves

Surfrider Foundation publishes a bi-monthly newsletter, Making Waves. Through its coverage of campaign developments and victories, Chapter updates, and environmental and scientific news stories, Making Waves remains one of Surfrider Foundation’s most effective vehicles in educating and communicating with our members on activities and achievements within the organization. <http://www.surfrider.org/media5a.asp>



## Soup

Soup is Surfrider Foundation’s weekly email newsletter that focuses on ocean and environmentally related current events. Reaching 50,000 subscribers around the world, Soup is one of the most efficient ways to stay up-to-date on the health of our oceans, waves and beaches.



## Environmental Issues Team (EIT)

The Environmental Issues Team is a network of scientific and technical experts in ocean, coastal and environmental disciplines who volunteer their expertise to Surfrider Foundation Chapters and the Global Headquarters office staff. The EIT helps Surfrider Foundation ensure that our positions, campaigns and proposed solutions to environmental issues are science based. EIT members assist in the formulation of environmental policies and provide technical review and expertise as needed for site-specific campaigns as well as issue-driven efforts. Our regional staff has significantly advanced the use of the EIT by creating regional EITs for specific issues such as wave energy in Oregon or beach-fill campaigns in Florida.

## Legal Issues Team (LIT)

The Legal Issues Team (LIT) is an invaluable group of pro bono attorneys and law firms who have volunteered to assist Surfrider with a variety of legal issues, including litigation efforts, legislative analysis, and general legal advice. The LIT is an innovative and financially prudent approach to addressing the need for legal assistance to our Chapters and the organization as a whole. Surfrider’s Managing Attorney maintains a list of volunteer attorneys in the LIT database. The LIT members are individually called upon when legal issues arise in their area of expertise, or if the LIT member is bar-certified in a state where Surfrider is considering litigation. Our LIT members have helped to further Surfrider’s mission in local litigation efforts and through assisting regional staff. The LIT has also been utilized to address issues arising from our international program, membership department, information technology concerns, and marketing matters.

# Ways To GIVE

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 percent 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 to 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, the sum of \$ \_\_\_\_\_ (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 (to establish the \_\_\_\_\_ fund) 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 substantially 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.

## Donor Recognition

### Legacy Circle

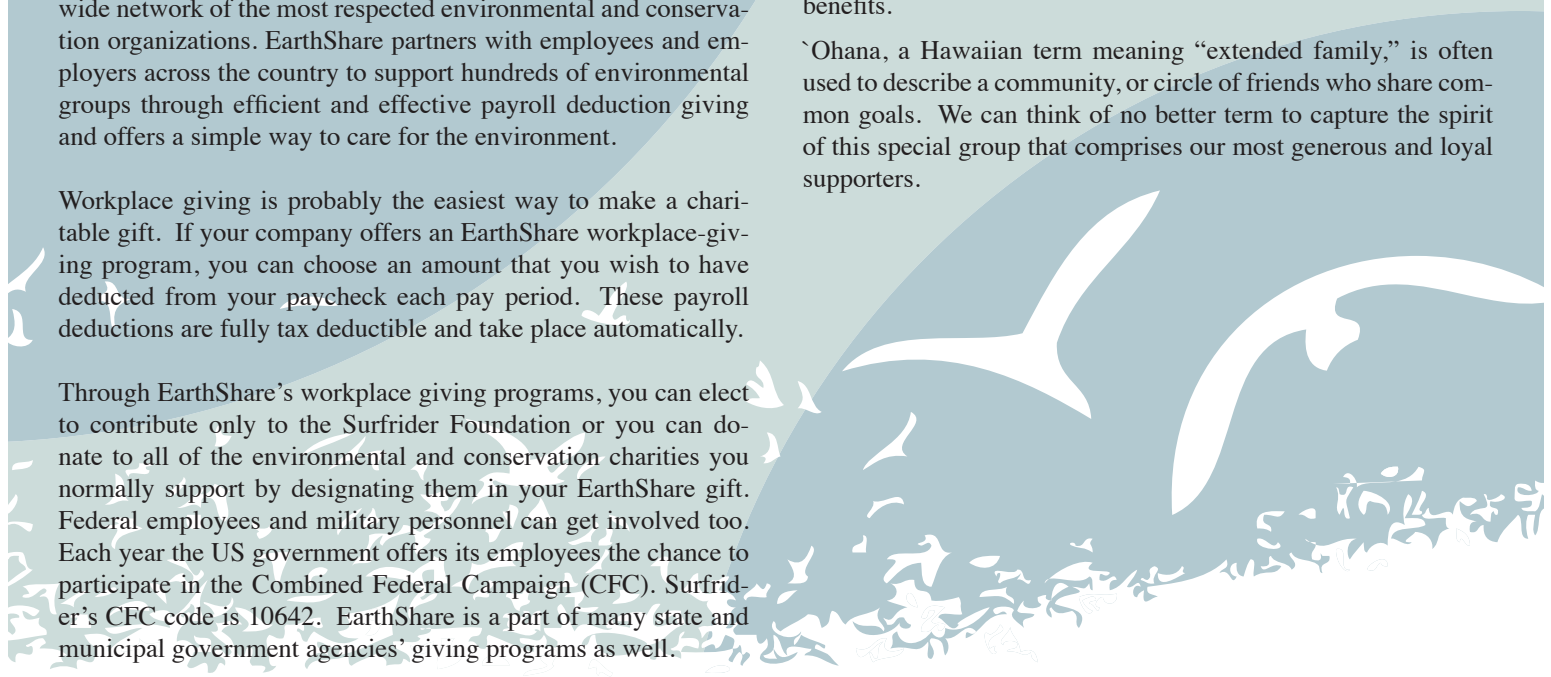
The *Legacy Circle* was established to recognize and honor our friends who have included Surfrider Foundation in their plans. They have done so by naming Surfrider as a beneficiary to wills, living trusts, IRAs, life insurance and other life-income gifts or who have made an outright gift to the Surfrider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

Should you now qualify for membership in the Legacy Circle, or for more information about planned giving options such as wills and bequests, gifts of life insurance, or other future provisions, please contact Surfrider Foundation's Director of Development.

### 'Ohana

All donors who contribute \$2,000 or more each year are considered part of the Surfrider 'Ohana and receive certain unique benefits.

'Ohana, a Hawaiian term meaning "extended family," is often used to describe a community, or circle of friends who share common goals. We can think of no better term to capture the spirit of this special group that comprises our most generous and loyal supporters.



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Special thanks go to the 50,000+ members who constitute the cornerstone of support for our mission. Their generous response to special appeals for funding critical programs and issues often means the difference between success and failure. In addition to their valuable financial support, thousands of Surfrider Foundation members contribute endless hours of grassroots activism, the cornerstone of this organization. We extend again our immense gratitude to all grassroots who have contributed to Surfrider Foundation.

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Created in 2007 by his parents, Harriet Zaretsky and Stephen Henry, the Dillon Henry Memorial Internship was created to honor Dillon's memory, recognize his commitment to the oceans and coastal environment and help young people to pursue a career in coastal and marine conservation. The Endowment provides funds on an annual basis for two interns working with Surfrider Foundation's Environmental Department or Legal Department. The family welcomes additional donations to the fund. For more info visit [www.dillonslist.org](http://www.dillonslist.org).

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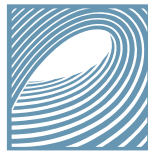
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## MISSION STATEMENT

2009

*Surfrider Foundation is a non-profit environmental organization dedicated to the protection and enjoyment of the world's oceans, waves and beaches, for all people, through conservation, activism, research and education.*

Surfrider Foundation was founded in 1984 by a handful of environmentally minded surfers who were concerned about threats to their local surf break. In the years since, Surfrider Foundation has grown into one of the nation's premier grass-roots environmental organizations.

Our first Surfrider chapters were formed in 1991. Today, our activist network has grown to more than 70 chapters across the United States and Puerto Rico with International chapters in Canada, as well as International Affiliates in Argentina, Australia, Brazil, Japan, Europe, and Morocco. Each of our chapters continues to be volunteer-driven and coordinated by our global headquarters, with activists implementing environmental advocacy campaigns and our national programs such as the Blue Water Task Force and Respect the Beach.

Surfrider Foundation Headquarters is located in San Clemente, California. The 40 paid employees, along with their staff of interns and volunteers, work year-round to provide support for our chapters and general membership in facilitating Surfrider Foundation's mission.

Surfrider Foundation also maintains a 15-member National Board of Directors. The Board of Directors, as well as our Chief Financial Officer, serve in volunteer positions and meet three times per year to provide strategic guidance and fiscal oversight to the organization and chapters.

### THE SURFRIDER FOUNDATION

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