

Inside **Philanthropy**

Why Estate Planning Matters for LGBTIQ Donors and Causes

Katie Hultquist, Guest Contributor | October 19, 2023



OUTSTANDING LEGACY CIRCLE DONORS AT OUTRIGHT INTERNATIONAL'S CELEBRATION OF COURAGE GALA. PHOTO COURTESY OF OUTRIGHT INTERNATIONAL

As the Silent Generation and baby boomers age, an estimated [\\$73 trillion](#) will be passed on to younger generations in the greatest wealth transfer in history — with an additional significant increase in planned and

estate gifts to charities over the next couple of decades. But what does this transition mean for LGBTIQ communities and causes?

Here's one example: In 2006, Seattle philanthropist (and one of Microsoft's first five employees) Ric Weiland passed away, leaving \$65.5 million to 11 LGBTIQ organizations — the largest-ever single donation to the movement at that time. Ric's vision and generosity quite literally changed the trajectory and success of these causes — including my organization, [Outright International](#). As [explained by the Pride Foundation](#), in 2006, the LGBTIQ movement was still relatively small and scrappy — even many of the larger organizations were still often powered by volunteers or small, overworked staffs. There was not yet federal marriage equality, most LGBTIQ people did not have any legal workplace protections, and it was only three years after *Lawrence v. Texas*, the 2003 Supreme Court decision that *finally* decriminalized same-sex relations across the U.S. For Outright, Ric's gift was by far the largest in our history and gave us the support, space and confidence to dream even bigger about what we could achieve with our global partners — and to grow into the strong organization we are today.

Ten years later, in 2016, beloved lesbian activist, author and publisher [Jeanne Córdova passed away](#), leaving significant gifts to Outright and several other organizations supporting queer women and the LGBTIQ community. Jeanne and her partner Lynn Ballen were integral members of and longtime donors in lesbian and feminist communities and they understood what an exceptional opportunity Jeanne

had to effect monumental change for the causes they cared about.

As the National Task Force on LGBTIQ Planned Giving, [Horizons Foundation](#) and others have shared, [comprehensive research](#) estimates that more than \$270 billion will pass through the estates of LGBTIQ people over the next decade. There are approximately 1.5 million LGBTIQ people over age 65 in the U.S., and many of these “Stonewall generations” are often deeply connected to the LGBTIQ movement that has fought for their rights and saved thousands of lives over the past few decades. As we witness a rising backlash against and challenges to LGBTIQ rights in many places, queer people understand that investment in organizations that support and defend the rights of their community is essential to protect and continue progress.

In addition, despite the growing numbers of LGBTIQ people who have children, nearly two-thirds do not have children, which is a critical data point since [donors without children are nearly three times as likely](#) to make a planned charitable gift as those who do have children.

The opportunity this specific moment presents to the LGBTIQ movement is unprecedented, yet precarious. Few LGBTIQ organizations have yet made significant investments in planned giving, and many are still small and largely run by volunteers or dedicated but overburdened staff. In addition, many LGBTIQ donors have not been approached or do not have ready access to resources that could help them develop impactful estate plans.

This reality is set against an alarming global context. The LGBTIQ community is one of the most marginalized and persecuted around the world: 65 countries still criminalize same-sex relations, and **in 25 countries, there are no LGBTIQ organizations** to protect or advocate for LGBTIQ people. **Uganda recently passed an extreme new Anti-Homosexuality Act** that imposes harsher penalties for homosexuality, including the death sentence in some cases, and other African nations are discussing similar laws and drafting similar legislation to follow suit. Crackdowns have increased in places like Russia and China. One of the largest and most established LGBTIQ organizations in China was **recently forced to close its doors** and many activists have gone underground. In the U.S., **more than 500 anti-LGBTIQ bills** were introduced in state legislatures in 2023 alone.

Despite these challenges, LGBTIQ advocates and allies have made tremendous progress over the last several decades. For example, in 2022, four countries shed their colonial-era laws banning same-sex relationships, and 20 countries now allow transgender and gender-diverse people to determine for themselves how to identify on their legal documents. In addition, huge strides have been made at the international level **within the U.N. system** and beyond to normalize LGBTIQ rights as human rights. These and many other hard-won victories are the result of the determination and strategic organizing of hundreds of activists, and fueled by thousands of donors who stand in solidarity with them.

Unfortunately, LGBTIQ groups are still severely underfunded. Even in the U.S., **just \$.28 for every**

[\\$100 given by foundations](#) focuses on LGBTIQ groups and issues. Globally, the picture is significantly worse: [Less than half the total funding](#) for LGBTIQ issues goes to programs outside the U.S. and Canada and [only 5% of foundation giving](#) to human rights causes globally — and 1% of government funding — goes to support LGBTIQ communities. Alarmingly, the growing backlash against LGBTIQ people in Africa, the Caribbean and other regions has been [significantly funded by conservative, extremist donors in the West](#), especially in the U.S.

It is clear there is a tremendous opportunity to radically accelerate social and legal change for LGBTIQ people and to ensure that progress is not lost — if significant philanthropic investment from new partners is mobilized over the next several years. That's why donors like Ric, Jeanne and thousands of other everyday supporters are so important. Through planned giving, LGBTIQ people — and those who care about them — can help create a world with safety, dignity and equality for everyone, often by making transformational gifts much larger than what they can give during their lifetimes. In addition, by investing in planned giving now, LGBTIQ causes can empower and encourage these donors to leave a legacy that will impact future generations of LGBTIQ people everywhere.

Katie Hultquist is the Director of Leadership Giving for [Outright International](#), which launched its Outstanding Legacy Circle in 2020.