

 FOREVER BITTERROOT

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**YOUR VALUES LIVE ON**

Together we can protect the place we love.

BITTER ROOT



LAND TRUST



## PLANNED GIVING

### YOU CAN MAKE A WORLD OF DIFFERENCE

Can you imagine the Bitterroot Valley, without its verdant green hay fields dotted with cows and calves? Without the familiar silhouette of an osprey overhead? Or if native westslope cutthroat trout were gone from our river and creeks?

Neither can we.

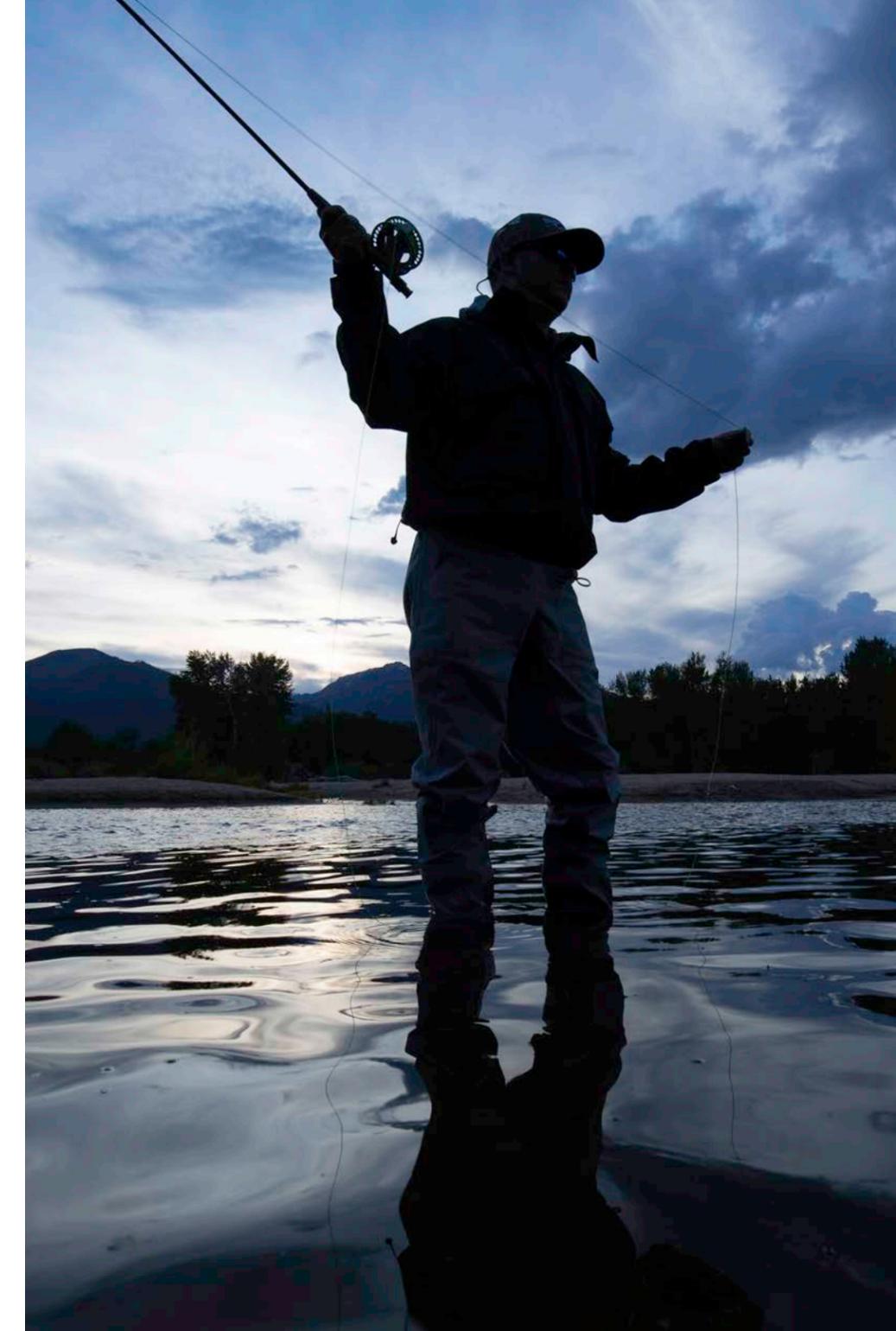
Like many rural and beautiful mountain valleys, the Bitterroot is rapidly growing and changing. Agricultural land, wildlife habitat, evergreen forests, and Bitterroot open spaces are lost each year.

And once it's gone, it's gone forever.

With these pressures facing rural Montana, perhaps you're wondering "what will the Bitterroot Valley be like decades from now?"

Thankfully, you are here to make a difference that will live on for generations to come.

No matter what stage of life you're in, you can make a greater impact that protects the lands and waters of the Bitterroot Valley, benefits your loved ones, and reaches future generations with a planned gift to the Bitter Root Land Trust.



I value the places I hike, bike, backpack, swim, and draw inspiration from our local beautiful open land. I'm grateful these same opportunities will be here for generations to come.

- LILY OGDEN,  
HIGH SCHOOL INTERN

## WHAT MATTERS MOST

Join others with a gift through **Forever Bitterroot** to ensure that the lands and waters you love will be here for the future.

It's easy to start a conversation with us about your vision for the future and how you can make a difference with a gift through your will. You can pass on what matters most to you: a future full of wide-open spaces, diverse wildlife, thriving working lands, and a rural way of life.

## YOUR PASSION FOR CONSERVATION LIVES ON

No gift is too small. Your generosity will be remembered and your values will live on.

When you name the **Bitter Root Land Trust** as a beneficiary of your planned gift, you help: conserve cold, clean creeks that flow into the Bitterroot River, safeguard wildlife corridors for elk, deer, and moose, ensure working farms and ranches remain a thriving part of the valley's economy and heritage, and connect more people to nature in ways that are meaningful to them.

## HOW YOUR GIFT WILL BE USED

The **Bitter Root Land Trust** uses charitable gifts to support local conservation efforts that protect the Bitterroot Valley's special waters, wildlife habitat, and working farms and ranches, unless otherwise specified by you. If you would like your gift to be used for a specific area, project, or program that is important to you, please contact us to ensure your wishes can be met. However, an unrestricted gift provides us with the flexibility to use your gift where it is needed most.

**For conservation to stand the test of time we need to connect people from all walks of life to these special places—and you can make that happen.**



## GIFTS FOR THE FUTURE

### Will or Trust

One of the most simple and effective ways to pass on your values is to leave a gift to the **Bitter Root Land Trust** in your will or trust. You can designate a particular asset or a percentage of your estate to **BRLT**, or include a bequest provision in your will or revocable trust. You can do this while creating your will or trust, or you can amend an existing one with a simple document. The land trust can be either a primary or a contingent beneficiary.

### Life Insurance Policy

By naming **BRLT** as the beneficiary of an individual or group term life insurance policy, the benefits from your policy pass to us free of federal estate tax after your lifetime.

### Retirement Plan

Take care of your heirs and the lands and waters you love by making **BRLT** a full or partial beneficiary of your 401(k) or other qualified retirement plan. You may be surprised to find that the taxes applied to your retirement plan assets are different than you imagined—in fact, using retirement assets to make your donation and leaving other assets to your heirs often enables you to give more to your heirs.

## GIFTS OF ASSETS

### Land and Property

You may wish to explore donating a residence or vacation property for conservation purposes. Or you may be interested in donating your real estate as an asset for **BRLT** to liquidate and use the proceeds for our conservation mission. In many cases, gifts of real estate can generate significant tax savings for the donor and the donor's heirs, while providing substantial conservation values, financial resources, or both to **BRLT**.

Donors intending to donate gifts of real estate are encouraged to discuss the feasibility and practicality of their gifts with **Bitter Root Land Trust** staff before designating their gift.

### Individual Retirement Account

Depending on your age, federal law allows you to make a transfer directly from your IRA to a qualified charity, such as **BRLT**, up to \$100,000 per year. Often, this type of donation (a qualified charitable distribution) will be tax free and can be used to fulfill the annual required minimum distribution (RMD) from your IRA. In addition to reducing your tax burden by removing all or a portion of your RMD from your income stream, your IRA distribution to **BRLT** will result in direct conservation efforts right here, in the Bitterroot Valley.

**Always consult your financial advisor when making any estate or financial decisions**

## OTHER PLANNED GIFT OPTIONS

### Charitable Gift Annuities

### Deferred Gift Annuities

### Charitable Lead Trusts

### Donor Advised Funds

Some planned gifts have an impact now, some after your lifetime. Many offer tax savings, and some even provide you with income for life. The gifts mentioned here are just some of the options. **We encourage you to reach out to us—we're happy to help every step of the way.**

For confidential discussions related to planned giving options that include gifts of land, naming the land trust in your will, trust, or other estate plan, please contact Gavin Ricklefs at 406-375-0956, or [gavin.ricklefs@bitterrootlandtrust.org](mailto:gavin.ricklefs@bitterrootlandtrust.org).

We look forward to hearing about why you are passionate about conservation, and how you would like to help.

If you have already included us in your financial plans, let us know, so we can thank you for your leadership in our **Forever Bitterroot** Program.

## SAMPLE LANGUAGE FOR YOUR PLAN

If you wish to name the **Bitter Root Land Trust** in your will or estate plan, or designate us as a beneficiary of your retirement accounts or life insurance, please name us as:

The **Bitter Root Land Trust**, a nonprofit corporation, organized and existing under the laws of the state of Montana, with principal business address of 170 S 2nd Street, Suite B, Hamilton, Montana 59840 and our EIN is 31-1595967.

**OUR PROMISE IS TO BE  
HERE FOR THE LONG-HAUL.  
YOU CAN HELP ENSURE THIS  
LASTING CONSERVATION  
LEGACY WITH A PLANNED  
GIFT TO THE BITTER ROOT  
LAND TRUST.**



YOUR VALUES LIVE ON WITH A PLANNED GIFT

Bitter Root Land Trust | PO BOX 1806 | 170 South 2nd Street, Suite B | Hamilton, MT 59840 | (406) 375-0956 | [www.bitterrootlandtrust.org](http://www.bitterrootlandtrust.org)

Special thanks to Jason Savage Photography

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