



 **FOREVER BITTERROOT**

PLANNED GIVING PROGRAM

**YOUR VALUES LIVE ON**

Together we can protect the place you love.

BITTER ROOT



LAND TRUST





## PLANNED GIVING

### *PLANNING FOR THE FUTURE*

Also referred to as “gift planning”, planned giving is a donor’s wish to contribute a gift to a non-profit organization during or beyond their lifetime. Donors make arrangements for planned gifts in the present but they are distributed at a later date. Gifts contributed by a donor can be made as a part of their financial or estate plans.

## YOU CAN PROTECT THE PLACE YOU LOVE

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

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

With these pressures facing our special valley, what will the Bitterroot Valley be like decades from now?

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

With a planned gift to the Bitter Root Land Trust you can make a greater impact that protects the lands and waters of the Bitterroot Valley, benefits your loved ones, and creates a better future for the Bitterroot's next generation.





“My husband and I were working on our estate plan, and avoiding probate was at the top of our list. We were clear that we wanted to choose the Bitter Root Land Trust to leave our home to when we die. As we get older, we think of what legacy we want to leave behind, and preserving areas in the beautiful Bitterroot and supporting wildlife are what we believe in very strongly. What better way than to leave something behind for future generations of people and animals here in our valley?”

- B.L., BITTERROOT HOMEOWNER

## WHAT MATTERS MOST

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, providing recreation access to our community, diverse wildlife, thriving working farms and ranches, and our rural way of life.

Join other community members in our “Forever Bitterroot” program, by letting us know you have made a planned gift.



## YOUR PASSION FOR CONSERVATION LIVES 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.

These values that matter to you - the reasons why you love the Bitterroot - will live on.

## 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

You can make **BRLT** a full or partial beneficiary of your 401(k) or other qualified retirement plan. Using retirement assets to make your donation and leaving other assets to your heirs may allow you to give more to your heirs.

### Transfer on Death

Montana law allows for transfer on death deeds (TOD deeds)—a deed, executed and recorded during the lifetime of the grantor(s), which allows real property to pass to the designated beneficiaries outside of probate.

### Land and Property

You may be interested in donating your real estate, whether a primary residence or vacation property, as an asset for **BRLT** to liquidate and use the proceeds. 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 or property 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. This may reduce your tax burden by removing all or a portion of your RMD from your income stream.

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

## OTHER PLANNED GIFT OPTIONS

**Donor Advised Funds**  
**Charitable Gift Annuities**  
**Deferred Gift Annuities**  
**Charitable Lead Trusts**

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 (gavin.ricklefs@bitterrootlandtrust.org) or Lauren Rennaker (lauren@bitterrootlandtrust) at 406-375-0956.

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, please let us know, so we can thank you for your leadership through 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 Tax ID (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.**



Please consider  
becoming a  
member of  
our Forever  
Bitterroot  
Program today.



YOUR VALUES LIVE ON WITH A PLANNED GIFT

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(406) 375-0956 | [www.bitterrootlandtrust.org](http://www.bitterrootlandtrust.org)

Special thanks to Jason Savage Photography

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