

PLANNED GIVING – Leave a Lasting Legacy



A planned gift to Whitefish Legacy Partners is a simple and meaningful way to help protect the places, trails, and outdoor experiences that make our community special for generations to come.

There are many ways to include Whitefish Legacy Partners in your plans. One of the simplest is to name Whitefish Legacy Partners as a beneficiary of your **will or trust, qualified retirement account, or life insurance policy**. You can make a lasting impact while retaining the flexibility to use your assets during your lifetime. We encourage you to consult with your attorney, financial advisor, or tax professional to determine what type of gift is right for you.

Sample bequest/gift language to be reviewed with your attorney can be customized to your personal needs, interests, and circumstances.

Unrestricted Bequest/Gift *"I give, devise, and bequeath [% of my estate/ \$ / all the rest, residue, and remainder of my estate] to Whitefish Legacy Partners, a Montana nonprofit corporation, currently located at 855 Beaver Lake Road, Whitefish, Montana for its general charitable purposes."*

Designated Bequest/Gift *"I give, devise, and bequeath the sum of \$_____ to be used for the _____ (specific program, project, etc.) to Whitefish Legacy Partners, a Montana nonprofit corporation, currently located at 855 Beaver Lake Road, Whitefish, Montana. Should this program no longer be active, the bequest may be used as the Board of Directors determines."*

If you have already included Whitefish Legacy Partners in your estate plans, we would be honored to know so we can thank you and recognize your commitment to the future of Whitefish Legacy Partners, the Legacy Center, and the Whitefish Trail.

To learn more about making a planned gift, please contact Heidi Van Everen, Executive Director, or Cynthia Ingelfinger, Director of Development, at Whitefish Legacy Partners at 406.862.3880. To obtain WLP's bequest intention letter, email heidi@whitefishlegacy.org.

We are honored and heartened by your interest in our organization. Thank you.

BEQUEST INTENTION LETTER

Whitefish Legacy Partners

Date: _____

855 Beaver Lake Rd, Whitefish, Montana 59937

Dear Whitefish Legacy Partners,

I am pleased to inform you that I have included **Whitefish Legacy Partners** in my estate plans through a bequest in my will or other estate-planning arrangements. It is my intention that my gift support the continued conservation, recreation, outdoor education, and stewardship work of Whitefish Legacy Partners and help ensure that the Whitefish Trail and the places and experiences it provides remain a lasting part of our community. My current intention is to make the following provision for Whitefish Legacy Partners:

Type of gift:

- ☐ Percentage of estate: _____ % ☐ Specific dollar amount: \$ _____
☐ Residual or remainder of estate ☐ Other: _____

Estimated value of gift (if known): \$ _____

Designation or purpose of gift:

- ☐ Unrestricted — to be used for the general charitable purposes of Whitefish Legacy Partners
☐ Restricted — as described below:

I understand that this letter is an expression of my current charitable intentions and is not a legally binding agreement. My estate plan and governing documents will control the final distribution of my estate. I may change my estate plans at any time, and I will notify Whitefish Legacy Partners if I make a change that affects this intended gift.

I would like Whitefish Legacy Partners to contact me regarding this gift:

- ☐ Yes ☐ No

I would like my gift to be recognized as part of Whitefish Legacy Partners' legacy giving community:

- ☐ Yes ☐ No ☐ I would prefer to remain anonymous.

Thank you for the opportunity to help shape the future of Whitefish Legacy Partners and the Whitefish Trail. It is meaningful to me to know that my support can continue beyond my lifetime.

Sincerely,

Donor Name: _____

Signature: _____

Date: _____

Phone: _____

Address: _____

Email: _____

Optional Estate Planning Information

If you are comfortable sharing, please provide the following information so that Whitefish Legacy Partners can properly acknowledge and administer your intended gift:

Attorney/Advisor Name: _____

Firm: _____

Phone/Email: _____

Executor/Personal Representative (if known): _____

Relationship: _____