



Montana 4-H Foundation Heritage Club



The Montana 4-H Foundation's Planned Giving Society

You may remember starting your 4-H club meeting by pledging your head, heart, hands and health so your community and even the world, were better places for all to live. You may also remember serving 4-H at the local, state or national level “to make the best better.” For you and many other 4-H friends and alumni, many years have passed since you last recited the words of the 4-H pledge and motto. Now, you have the opportunity to recite these words again by becoming a member of a new 4-H club: The Montana 4-H Foundation Heritage Club.

The Heritage Club, the planned giving society of the Montana 4-H Foundation, enables you to join with others who have demonstrated a strong passion and support for Montana 4-H's future by naming the Montana 4-H Foundation in their estate plans. Club membership allows the Montana 4-H Foundation to thank and recognize you on behalf of future generations of 4-H youth whose lives will be positively impacted because of your decisions and generosity now.

The Montana 4-H Foundation Heritage Club was inspired by 4-H luminaries like Seaman Knapp, Gertrude Warren and Ed Aiton, who built the foundation of an organization that continues to strengthen and grow over 100 years after its founding. By sharing your belief in 4-H's positive future, you join the tradition of luminaries who inspired a movement that continues today in Montana with 20,000 young people, thousands of volunteers and passion that is impossible to extinguish.

Anyone who has made a planned gift to the Montana 4-H Foundation and completed a Declaration of Intent is eligible for membership in the Heritage Club. That's it! There are no fees or minimum investments required to become a member of the Heritage Club.

As a Montana 4-H Foundation Heritage Club member, you will associate with other 4-H alumni and supporters and have a continuous connection to today's 4-H movement in Montana.

You will also receive the following exclusive benefits:



Montana 4-H Foundation Heritage Club pin: This original pin, specially designed for members of the Heritage Club, is a keepsake to remind you of how your gift will help Montana 4-H for years to come.



Invitations to Montana 4-H Foundation events: You will have opportunities to reconnect with old 4-H friends and make new ones.



Continued communication with Montana 4-H: Keep up-to-date with great stories about today's 4-H youth featured in our bi-annual newsletter.



Tax benefits: We encourage you to work with your attorney or estate planner to identify the tax benefits that may accrue to you through your gift.



In order to join the Montana 4-H Foundation Heritage Club, please contact Sandra Germann, Executive Director at sandra.germann@montana.edu or 406.994.5691. Once you have established your planned gift and completed a Planned Gift Declaration of Intent, you will become a member of the Heritage Club and start receiving many great benefits!

MONTANA 4-H FOUNDATION HERITAGE CLUB

Frequently Asked Questions

What are the benefits of membership in the Montana 4-H Foundation Heritage Club? As a member of the Montana 4-H Foundation's planned giving society, you will receive:

- Information about planned giving options
- Newsletters with exciting stories about Montana 4-H's high quality, positive youth development programming
- Invitations to yearly events hosted by the Montana 4-H Foundation
- Special recognition, including a custom-designed pin
- Opportunities to stay in touch with others who have a passion for 4-H
- You may also realize tax benefits when making a legacy gift to the Montana 4-H Foundation; we encourage you to work with your attorney or estate planner to determine tax benefits that are unique to your financial situation.

What planned giving vehicles does the Montana 4-H Foundation accept?

The Montana 4-H Foundation accepts planned gifts through a variety of planned giving vehicles, including:

- Bequests through wills and trusts
- Charitable remainder annuity trusts
- Insurance policies
- Securities
- Cash

We are glad to discuss additional vehicles that you feel may be better suited to your particular financial needs and plans.



Sandra German
Executive Director
406.994.5691
sandra.germann@montana.edu

How do I leave to the Montana 4-H Foundation in my will?

Sample bequest language is provided that you may wish to use when working on your will or trust with your attorney or estate planner. You are under no obligation, however, to use this language in order to leave an estate gift to the Montana 4-H Foundation.

Sample bequest language:

"I give (the sum, percentage of estate, or description of property) to the Montana 4-H Foundation, 111 Taylor Hall, PO Box 173580, Bozeman, MT 59717 to be used for its general unrestricted purposes."

NOTE: WITH A SEPARATE MEMORANDUM OF AGREEMENT, GIFTS MAY BE DESIGNATED TO BENEFIT SPECIFIC EXISTING FUNDS.

What happens to my gift once it matures?

When your gift has matured and the Montana 4-H Foundation has been notified of the impending contribution, the Foundation's Executive Director will work with your lawyer or estate representative to secure the gift and ensure proper recognition and use of your legacy gift.

May I keep my estate gift anonymous?

Yes, you may keep your planned gift anonymous. Mark the "anonymous" check box on the planned gift Declaration of Intent form we provide for you.

DECLARATION OF INTENT FORM

May I direct my planned gift to a specific program area?

We are glad to discuss your 4-H program interests and help you designate your gift to an intended purpose. You may designate any amount to an existing fund. Please contact Sandra Germann, Executive Director, to learn about options.

MONTANA 4-H FOUNDATION HERITAGE CLUB

Declaration of Intent

I/we are pleased to indicate that the Montana 4-H Foundation is a beneficiary in my/our estate distribution. I/we understand this qualifies me/us for membership in the Montana 4-H Foundation Heritage Club and my/our name will be published periodically in brochures, articles, etc. I/we also understand that this is a "Declaration of Intent" only, not a legally binding commitment.

Please note: If anonymity is preferred, please check the appropriate box below.

The bequest is set forth in my/our:

- ☐ Will
- ☐ Trust
- ☐ Insurance Policy
- ☐ Other:

The Montana 4-H Foundation may publish my/our name(s) as members of the Heritage Club.

- ☐ Yes
- ☐ No, I/we would like to remain anonymous

Please display my/our name(s) as the following within Montana 4-H Foundation publications.

Signature

Print Name

Date

Signature

Print Name

Date



Please mail, fax, or email this form back to:

Sandra Germann, *Executive Director*
Montana 4-H Foundation
111 Taylor Hall
PO Box 173580
Bozeman, MT 59717

Phone: 406.994.5691
Fax: 406.994.5417
Email: sandra.germann@montana.edu