

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.



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Executive Director
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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.