



Legacy Giving Through a Bequest

If you're interested in supporting Wild Montana's mission, one great way to do so is by making a planned gift or leaving a bequest in your will, living trust, or with a codicil. By making a gift through a bequest, you can continue to use the investments or property you plan to leave to charity during your lifetime, and also leave a lasting legacy. It's important to note that you don't need to be wealthy to make a legacy gift, and it can be done through a simple will.

General Information

Wild Montana
80 S Warren St.
Helena, MT 59601
(406) 443-7350

Federal ID Number: 51-0198932

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If you've already named the Montana Wilderness Association as a beneficiary in your estate plan, there's no need to worry. Legally, we are the Montana Wilderness Association, doing business as Wild Montana. We have the same federal tax ID number, office location, and contact information, so there shouldn't be any issues with ensuring that the directives in your will are honored.

Types of Bequests

There are a number of ways you can make a bequest to Wild Montana.

Specific Bequest. A specific bequest involves making a gift of a specific asset such as real estate, a car, other property, or a gift for a specific dollar amount. For example, you may wish to leave your home or \$25,000 to Wild Montana.

Percentage Bequest. Another kind of specific bequest involves leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 20% of your estate to Wild Montana.

Residual Bequest. A residual bequest is made from the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves

leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 30% of the residue of your estate to Wild Montana.

Contingent Bequest. A contingent bequest is made to charity only if the purpose of the primary bequest cannot be met. For example, you could leave specific property, such as a vacation home, to a relative, but the bequest language could provide that if the relative is not alive at the time of your death, the vacation home will go to Wild Montana.

Bequest Benefits

A bequest is generally a revocable gift, which means it can be changed or modified at any time. You can choose to designate that a bequest is used for a general or specific purpose so you have peace of mind knowing that your gift will be used as intended. Bequests are exempt from federal estate taxes. If you have a taxable estate, the estate tax charitable deduction may offset or eliminate estate taxes, resulting in a larger inheritance for your heirs.

Bequest Language

In order to make a bequest, you should speak with your attorney. Your attorney can help you include a bequest to Wild Montana in your estate plan. We have provided some basic language to assist you and your attorney.

1. Specific Bequest

If you are considering making an outright bequest to Wild Montana, we recommend the following language:

Bequest of a Specific Dollar Amount

I hereby give, devise and bequeath _____ and No/100 dollars (\$DOLLARS) to Wild Montana, a nonprofit organization located at 80 S. Warren Street, Helena, MT 59601, Federal Tax ID# 51-0198932, for Wild Montana's general use and purpose.

Bequest of Specific Personal Property

I hereby give, devise, and bequeath DESCRIPTION OF PROPERTY to Wild Montana, a nonprofit organization located at 80 S. Warren Street, Helena, MT 59601, Federal Tax ID# 51-0198932, for Wild Montana's general use and purpose.

Bequest of Specific Real Estate

I hereby give, devise, and bequeath all of the right, title, and interest in and to the real estate located at ADDRESS OR DESCRIPTION OF PROPERTY to Wild Montana, a nonprofit organization located

at 80 S. Warren Street, Helena, MT 59601, Federal Tax ID# 51-0198932, for Wild Montana's general use and purpose.

2. Percentage Bequest

If you are considering making a bequest of a percentage of your estate to Wild Montana, we recommend the following language:

I hereby give, devise, and bequeath ___ percent (___%) of my total estate, determined as of the date of my death, to Wild Montana, a nonprofit organization located at 80 S. Warren Street, Helena, MT 59601, Federal Tax ID# 51-0198932, for Wild Montana's general use and purpose.

3. Residual Bequest

I hereby give, devise, and bequeath to Wild Montana, a nonprofit organization located at 80 S. Warren Street, Helena, MT 59601, Federal Tax ID# 51-0198932, ALL OR A PERCENTAGE of the rest, residue, and remainder of my estate to be used for Wild Montana's general use and purpose.

4. Contingent Bequest

If (primary beneficiary) does not survive me, then I hereby give, devise, and bequeath to Wild Montana, a nonprofit organization located at 80 S. Warren Street, Helena, MT 59601, Federal Tax ID# 51-0198932, DESCRIPTION OF PROPERTY to be used for Wild Montana's general use and purpose.

5. Restricted Bequest

If you are considering a bequest but would like to ensure that it will be used for a specific purpose, please let us know. We would be happy to work with you and your attorney to help you identify ways to meet your charitable objectives. We will also work with you and your attorney to craft language to accomplish your goals.

If you are making a restricted bequest, we recommend that your attorney include the following provision to give Wild Montana flexibility should it no longer be possible for Wild Montana to use your gift as you originally intended:

If, in the judgment of Wild Montana's Board of Directors, it shall become impossible for Wild Montana to use this bequest to accomplish the specific purposes of this bequest, Wild Montana may use the income and principal of this gift for such purpose or purposes as the Board determines is most closely related to the restricted purpose of my bequest.

Due to the ever-changing nature of our work, it is entirely possible that the future time in which we receive funds from your estate our campaign priorities may have changed in

response to new threats or opportunities. Therefore, we encourage you to make your gift unrestricted so funds can be allocated to meet the most urgent needs at the time your gift is received.

Contact Us

If you have any questions about making a bequest to Wild Montana, or if you'd like more information to help you and your legal or financial advisor as you consider a planned gift, please don't hesitate to contact us. Additionally, if you've already included Wild Montana in your estate plan, please let us know. We would be grateful for the chance to thank you for your gift, find out how you'd like your gift to be recognized, and welcome you as a member of the Wild Montana Stewards.

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