

- I have included the Estes Valley Land Trust in my will/estate planning.
 - I give my permission for the Land Trust to recognize my planned gift by listing me as a Forever Estes Circle member.
 - Please keep my gift anonymous.
- Please send me more information on estate planning/bequest tools.
- Please have Jeffrey Boring, Executive Director, contact me, confidentially and without obligation, regarding these or other estate planning/bequest tools.

Name _____

Mailing address _____

State _____ Zip _____

Phone _____

Email _____

Physical Address
1191 Woodstock Drive #5

Mailing Address
P.O. Box 663 Estes Park, CO 80517

970-577-6837
evlt@evlandtrust.org

For more information on other ways to give,
please visit evlandtrust.org



FOREVER ESTES
— CIRCLE —

Estes Valley Land Trust

FOREVER ESTES CIRCLE

We all care deeply about the Estes Valley and want to preserve it forever. For this reason, the Estes Valley Land Trust has established the **Forever Estes Circle**, a group of individuals that want to ensure that land is preserved, even past their lifetime.

Most of us would rather not think about our mortality. But proper planning can provide comfort to your family and support the causes you care

about. Listing the Estes Valley Land Trust in your will is a unique opportunity to preserve the open space, trails and spectacular landscape in and around Estes Park, and in so doing, create a lasting legacy for you and your family. And it's simple. Please consider joining the **Forever Estes Circle** and take the time to consider the following options:

Name the Estes Valley Land Trust in Your Will

The most profound and effective means of benefitting the Estes Valley Land Trust is to name it as a beneficiary in your will. Insertion of the following language into your will provides funds that directly preserve open space by the Estes Valley Land Trust:

I give, devise, and bequeath to the Estes Valley Land Trust, a nonprofit Colorado public benefit corporation with business address of P.O. Box 663, Estes Park, Colorado 80517 or its successor, the sum of _____ dollars (or otherwise describe the gift or assets) for its general purposes and use at the discretion of the Estes Valley Land Trust's Board of Directors.

Name the Estes Valley Land Trust as a Beneficiary of Your Retirement Plan

401Ks and Individual Retirement Accounts are popular and effective savings vehicles. But what if you die before you are eligible to cash in the accounts? Unfortunately, they are then subject to a host of taxes that in most cases absorb a significant percentage of the accounts' value. A much better option is to name a qualified 501(c)(3) corporation such as the Estes Valley Land Trust as the beneficiary in the event of premature death. In this case, none of the asset is subject to tax.

Living Gifts

Gifts of Real Estate

The Estes Valley Land Trust encourages gifts of real estate. Whether you have land to donate for its environmental or conservation value, or land that we can sell or trade to raise funds to preserve treasured natural lands, it is all valuable to the Land Trust. This is a gift that can be given during your life or bequeathed to the Land Trust to reduce the value of your estate. The Land Trust has received numerous gifts of real estate, which have made a profound financial impact to the organization.

Reserved Life Estate

Many of our residents here in Estes Park enjoy the freedom a second home offers. One way to reduce your estate for tax planning purposes is to make a generous gift of your home to the Land Trust, with the caveat that you retain the right to lifetime use and enjoyment. You will receive income tax benefits in the year of the gift.

Charitable Remainder Trust

Creating a charitable remainder trust can provide a substantial deduction on your income taxes and a reduction in estate taxes. These trusts are often created with properties (real estate or stock), which have a large capital gain. The donor creates the trust and receives back income of at least 5% for life or a term of years, and no capital gains taxes are paid. At the end of the life term or term of years, the property is distributed to the Estes Valley Land Trust for its conservation work.

Charitable Lead Trust

By using the charitable lead trust estate tool, you may provide valuable income to the Land Trust now, while holding onto the assets you prefer to gift to your heirs. This is a great way to help the Land Trust presently and to see the fruits of your gift during your lifetime, while preserving the trust property for your heirs.

Life Insurance

Naming the Estes Valley Land Trust as the beneficiary of your life insurance policy is an easy way to make a sizable gift you may not have thought possible. When you irrevocably sign over ownership of your policy to the Estes Valley Land Trust, you will receive an immediate charitable deduction (usually very close to the policy's cash value).

Conservation Easement

If you donate a conservation easement, the taxable value of your existing land within the estate is significantly reduced.

Before considering any of these choices, please meet with your legal and financial advisors.