

Gift of Hope Legacy Society

A Planned Giving Guide



There is Strength in Numbers | Join Us.

Gift of Hope Legacy Society

The Gift of Hope Legacy Society is a group of individuals who have made arrangements for a future gift to Cancer Support Community Montana (CSCMT) through their estate plan or other deferred gift.

These gifts ensure that CSCMT fulfills our mission to *ensure that all people impacted by cancer are empowered by knowledge, strengthened by action, and sustained by community.*

We are honored when our friends consider CSCMT in their long-term planning. Whether they choose to be public or anonymous, donors become members of CSCMT Gift of Hope Legacy Society.



They Say There is
Strength in Numbers.

You count.

Become a Member in Just Two Steps

There are just two steps to become a member of the Gift of Hope Legacy Society:

1. Make arrangements for a gift of any amount to CSCMT through your will or other estate planning documents.
2. Sign a Letter of Gift Intent, or simply let us know that you included CSCMT in your will.

If desired, members of the Gift of Hope Legacy Society are recognized in Cancer Support Community Montana materials. Written permission will be required to be publicly acknowledged.

We are happy to answer questions and assist you in your planning. For more information, please contact us:

Cancer Support Community Montana
102 South 11th Avenue
Bozeman, MT 59715
Phone: (406) 582-1600
e-mail: info@cancersupportmontana.org
www.cancersupportmontana.org

Help Meet Future Needs

A bequest to CSCMT through your will or other estate planning vehicle is an effective way to ensure that CSCMT services are provided to future generations. It also enables a donor to make a major gift that might not otherwise be possible during life.

Design Your Legacy, Support Your Family

A Planned Gift allows you to manage your assets during your lifetime while taking comfort in the knowledge that you have made a commitment to help youth, adults and families affected by cancer.

Through a bequest, a donor may leave CSCMT a specific dollar amount or item, give all or a percentage of the estate, and that may be fulfilled before or after family members and other beneficiaries have benefited.

Cash, securities, real estate, or personal property are all appropriate means of making bequests. Gifts to CSCMT, including bequests, qualify as charitable contributions for purposes of federal income and estate taxes.



Choose Your Planned Gifts

Bequest

A gift through your will or trust gives you the comfort of providing for the future of Cancer Support Community Montana (CSCMT) and retaining your assets during your lifetime. A bequest also provides maximum flexibility because it is fully revocable and allows you to first provide for your heirs. Whether giving a certain sum of money, specific assets, or designating a portion of your estate to CSCMT, a bequest to support CSCMT is a way to ensure no one has to face cancer alone.

IRA, Retirement Account Beneficiary Designation

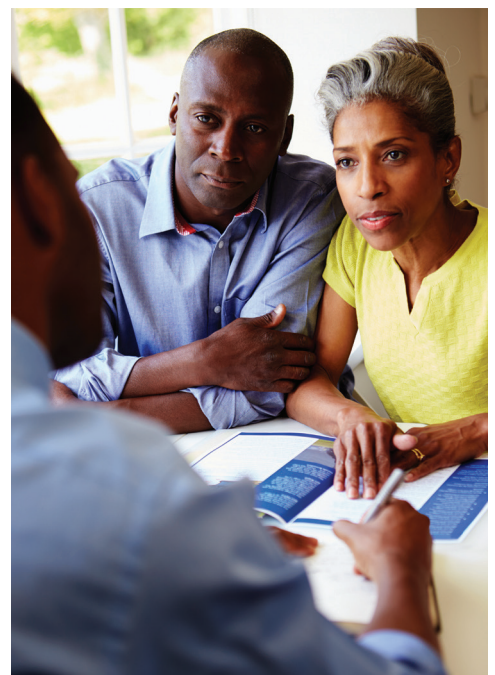
Individuals with retirement accounts can support CSCMT by naming CSCMT as a full or partial beneficiary of that asset. Beneficiary designations are easy to accomplish (follow the instructions on the beneficiary designation form) and are entirely revocable, giving individuals maximum planning flexibility. In many cases, they also generate tax advantages, especially with traditional IRAs.

Account Beneficiary Designation

Many bank accounts, investment accounts, and other financial accounts also allow for beneficiary designations. Simply naming CSCMT as a full or partial beneficiary of the account provides a future gift to CSCMT.

Gifts of Life Insurance

Life insurance policies that are no longer needed provide individuals with a unique opportunity to share the wealth — now or later. By naming CSCMT a full or partial beneficiary of a life insurance policy, the individual ensures the future of CSCMT. The beneficiary designation is revocable. To provide immediate support, an individual may make an irrevocable assignment of the life insurance policy to CSCMT. A gift of life insurance provides remarkable benefits to CSCMT and its programs.



Charitable Gift Annuity

A charitable gift annuity is a simple contractual agreement in which an individual gives assets in exchange for a promise to pay a fixed income to one or two individuals (“annuitants”) for life. Issued by a third party to support CSCMT, gift annuities are irrevocable and can be established at any dollar value, deferred to start payments at a later date, and strategically designed to maximize income, tax savings, and planning benefits for the donor.

About the Montana Endowment Tax Credit

The Montana Endowment Tax Credit allows donors to pay less in Montana state income taxes when they give a qualifying planned gift to a qualified Montana charitable endowment. The incentive is 40% of the gift’s federal charitable deduction, up to a maximum of \$10,000 tax credit, per year, per individual, and a credit of 20% of a direct gift by a qualified business, up to a maximum of \$10,000 per year.



Suggested Language for Bequests to Cancer Support Community Montana

I give to Cancer Support Community Montana, a Montana non-profit corporation (EIN 81-0542266), (the sum of \$_____) (the following asset) (____ percent of my adjusted gross estate) or (the rest, residue, and remainder of my estate). If the organization's Board of Trustees determines at the outset or at a later time that the stated purpose does not exist or no longer exists, or it is not possible or prudent for this bequest to be used as originally intended, the Board of Trustees may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above.

Exact Legal Name: Cancer Support Community Montana
Address of Office: 102 S. 11th Ave, Bozeman MT 59715
State of Incorporation: Montana
Federal Identification No: 81-0542266
Contact: Executive Director, Telephone: (406) 582-1600



THANK YOU





**Gift of Hope Legacy Society
Statement of Planned Gift Intention**

☐ I/We have made provisions for a gift to Cancer Support Community Montana as a part of my estate plan. This gift has been made using the following instrument(s):

- | | |
|--|--|
| <input type="checkbox"/> Bequest/Will | <input type="checkbox"/> Life Insurance Policy |
| <input type="checkbox"/> Charitable Gift Annuity | <input type="checkbox"/> Retirement Plan |
| <input type="checkbox"/> Trust | <input type="checkbox"/> Other |

Additional Information: _____

The estimated value of my gift is \$ _____ (optional and confidential)

☐ My/our charitable estate gift can be used where most needed.

OR

☐ My/our gift is designated for the following: _____

Signature 1

Signature 2

Date

Name(s) as you wish to appear for recognition

Address

E-mail Address

Telephone Number

- ☐ You will be part of ***Gift of Hope Legacy Society***, and:
- ☐ I/we approve public recognition of my/our gift
 - ☐ I/we choose not to be publicly recognized for this gift.

Please return documents and direct questions to:

Cancer Support Community Montana
102 S. 11th Ave
Bozeman, MT 59715

E-mail: info@cancersupportmontana.org
Phone: (406)582-1600
www.cancersupportmontana.org

Thank you for your support of Cancer Support Community Montana.

This expression of my present plans does *not constitute* a legally binding agreement.

Gift of Hope




**CANCER SUPPORT
COMMUNITY™**

MONTANA

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