

# LEAVING YOUR LEGACY WITH JEFFERSON LAND TRUST

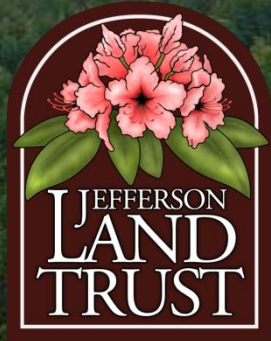


Photo Credit – John Gussman

## Your Gift – Your Legacy

*What is a person's legacy?*

*It is about the richness of the individual's life, including what that person accomplished and the impact he/she or they had on people and places.*

Thank you for your interest in leaving a legacy of land conservation with Jefferson Land Trust. Together with our community, we are working to preserve open space, working lands, and habitat forever. Planned giving is one of the most impactful ways you can support conservation, and by including Jefferson Land Trust in your estate plan, you will have the satisfaction of knowing that you are helping to protect the special places of Jefferson County forever.

*Anyone can make a legacy gift and no amount is too small to have a lasting impact.*

Our relationship to the land says everything about what kind of community we are, and the community we want to be. We protect land that produces food, timber, and jobs for Jefferson County in regenerative ways — so that our community can thrive with nature. We conserve land so that wildlife can flourish in its habitat, alongside humans. We care for land so that generations to come can enjoy the iconic landscapes, farmland, forests, fish, and wildlife we cherish. Together we have the passion, perseverance, and partnerships in place to ensure our community grows in balance with nature forever.

Including Jefferson Land Trust in your will is a simple, yet powerful way to ensure that future generations will enjoy the farms, habitat, and forests you enjoy today. There are many ways to make a legacy gift.

# Ways to Leave a Legacy

When you are choosing how to make your legacy gift, you can choose what your gift will support at Jefferson Land Trust.

## Unrestricted, Undesignated Gifts

Gifts that are undesignated or unrestricted are Jefferson Land Trust's highest need. It can be hard to know today what the most pressing need will be when your gift is made, so leaving your gift unrestricted allows the Land Trust staff and board at that time to put your generous gift where it is most needed then.

If you want to support just one aspect of Jefferson Land Trust's work, you can also choose from these options:

## Farms

Jefferson Land Trust works with willing farmers to preserve farmland by purchasing agricultural conservation easements that keep the land available for agriculture while compensating the landowner for the loss of development potential. This ensures prime farmland is not developed, helps to keep it affordable for the next generation of farmers, and provides a capital boost to local farm businesses. Your gift, or a portion of it, can support the Land Trust's work to ensure local farms provide local food long into the future.

*Sample bequest language: "I give \_\_\_\_\_ percentage (\_\_\_%) of my residuary estate to Jefferson Land Trust, a nonprofit 501(c)(3) corporation, located in Port Townsend, Washington, tax ID 91-1465078 to be used as determined by the board for the support of farmland in Jefferson County."*

## Fish and Wildlife

Jefferson Land Trust protects many habitat areas for wildlife to thrive and live naturally. From protecting and caring for streams to ensure clean water and salmon habitat, to ensuring wildlife have corridors to migrate as the climate changes, you can choose to have your gift, or a portion of it, go towards supporting fish and wildlife forever.



*Sample bequest language: "I give \_\_\_\_\_ percentage (\_\_\_%) of my residuary estate to Jefferson Land Trust, a nonprofit 501(c)(3) corporation, located in Port Townsend, Washington, tax ID 91-1465078 to be used as determined by the board for the support of fish and wildlife habitat in Jefferson County."*

## Forests

Forests are part of Jefferson County's identity, economy, and way of life. Forests not only provide native habitat for plants and wildlife, but recreational trails, scenic beauty, and a natural refuge for residents and visitors. While helping to

keep the air and water clean and sequester carbon, the working timberlands also create jobs and support our local economy. Your gift, or a portion of it, can go towards ensuring our special forests are protected and restored.

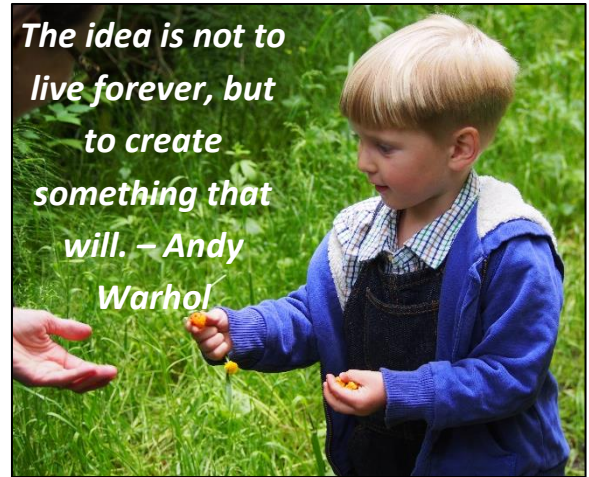
*Sample bequest language: "I give \_\_\_\_\_ percentage (\_\_\_%) of my residuary estate to Jefferson Land Trust, a nonprofit 501(c)(3) corporation, located in Port Townsend, Washington, tax ID 91-1465078 to be used as determined by the board for the support of forest preservation and restoration in Jefferson County."*

### **Forever**

Jefferson Land Trust has a legal obligation to protect the land held in conservation easements or owned outright and our Long-Term Stewardship Fund ensures the resources are always available for that purpose. We also consider nurturing the next generation of conservation leaders and land lovers to be an important part of the Land Trust's responsibility, and our Education Programming is developed to engage youth and lifelong learners alike. Supporting all our work, our Operations Endowment ensures the sustained success of the organization. Your gift, or a portion of it, can go towards ensuring our work lives on forever.

*Sample bequest language: "I give \_\_\_\_\_ percentage (\_\_\_%) of my residuary estate to Jefferson Land Trust, a nonprofit 501(c)(3) corporation, located in Port Townsend, Washington, tax ID 91-1465078 to be used as determined by the board for the support of Jefferson Land Trust's Long-Term Stewardship Fund/Education Programs/Operating Endowment."*

If you would like to further restrict or designate your gift to a specific area of our work (for example, a particular region, or activity), please contact us to discuss your wishes.



*The idea is not to  
live forever, but  
to create  
something that  
will. – Andy  
Warhol*

## **How to Leave a Legacy**

A planned gift is made as part of an overall estate plan and is usually, but not always, deferred until the end of the donor's life. By including Jefferson Land Trust in your estate plan, either you or your estate may qualify for a charitable deduction. Please consult with an experienced estate planning attorney who can help you find the best solution for your individual situation. There are many ways for donors to include Jefferson Land Trust in their estate plans.

### **Bequests**

The simplest and most common form of planned giving is a bequest in your will or revocable living trust. An example of simple bequest language: "I give \_\_\_\_\_ percentage (\_\_\_%) of my residuary estate to Jefferson Land Trust, a nonprofit 501(c)(3) corporation, located in Port Townsend, Washington, tax ID 91-1465078 to be used as determined by the board for the support of land protection and conservation in Jefferson County."

You can donate a percentage of your estate or you can opt to give a specific dollar amount, securities, real estate, using bequest language in a will or revocable living trust.

### Other Means of Planned Giving

In addition to naming Jefferson Land Trust in your will or revocable living trust, the following are common ways to include Jefferson Land Trust in your estate plan:

- **Traditional IRAs and qualifying 401(k) or 403(b) Plans:** Simply fill in the blanks to name JEFFERSON LAND TRUST as a primary or contingent beneficiary for all or a portion/percentage of your 401(k) or 403(b) plan: Jefferson Land Trust, tax ID 91-1465078
- **Brokerage/Bank Accounts:** Name Jefferson Land Trust, tax ID 91-1465078, as a Payable on Death (POD) or Transfer on Death (TOD) beneficiary of a bank or brokerage account
- **Life Insurance Policies:** Simply fill in the blanks on the beneficiary designation form provided by the insurance company and name Jefferson Land Trust, tax ID 91-1465078, as a beneficiary for all or a portion/percentage of the amount
- **Charitable Trusts:** Please consult your attorney
- **Annuities:** Please consult your attorney
- **Donations in Lieu of Flowers:** It is often customary, upon a loved one's passing, that donations be made to the deceased's favorite non-profit in lieu of flowers. To encourage this practice, common language for an obituary is: In lieu of flowers, please consider a donation to Jefferson Land Trust in \_\_\_\_\_'s memory. Donations can be made on the Land Trust's website ([www.saveland.org](http://www.saveland.org)) or by mail, at Jefferson Land Trust, 1033 Lawrence Street, Port Townsend WA 98368. Please indicate on the check or on the website's form that this donation is in \_\_\_\_\_'s memory. Land Trust staff will contact family members and share general information about contributions received in a loved one's memory.

Jefferson Land Trust's [Gift Acceptance Policy](#) guides the types of gifts the Land Trust can accept and outlines how they are considered by the staff and board. If you wish to make a legacy gift, we encourage you or your attorney to contact us to ensure we're able to accept your gift and can honor your intentions. Thank you for considering including Jefferson Land Trust in your estate plans.

## Contact Us

For further information, or to discuss including Jefferson Land Trust in your estate plans, contact Sarah Zablocki-Axling, Development Manager, at 360.379.9501 extension 108 or email [szaxling@saveland.org](mailto:szaxling@saveland.org).

This information does not constitute legal advice. Before making any bequest or planned gift to Jefferson Land Trust, donors should seek independent advice, including legal advice and taxation advice. Jefferson Land Trust cannot provide legal advice to members of the public. Jefferson Land Trust's Executive Director, Director of Philanthropy, and Development Manager can, however, discuss in general terms, with a donor or a donor's attorney, issues associated with a proposed gift or bequest to Jefferson Land Trust.

*[Thank you for including Jefferson Land Trust in your estate plans!](#)*





**Thank you for letting us know that you are considering  
or have already included  
Jefferson Land Trust in your estate plans.**

Please complete this form to share your wishes with us.

- ☐ I am interested in learning more about including Jefferson Land Trust in my will, estate or retirement plans.
- ☐ I have already included Jefferson Land Trust in my estate plans.
- ☐ You may list my/our names as listed below in Land Trust publications to inspire others.
- ☐ I/we wish to remain anonymous.

The following questions about your future gift are optional. We have included these questions to help us ensure that your wishes are accomplished in due time. This information will also help our Board of Directors to better plan for the future. I have made the following charitable gift plans to Jefferson Land Trust in my: (Please check all that apply.)

- ☐ Will (dated \_\_\_\_\_)
- ☐ Living trust (dated \_\_\_\_\_)
- ☐ Life insurance policy
- ☐ IRA or other pension plan
- ☐ Real estate (please describe as appropriate)
- ☐ Charitable trust
- ☐ Trust created in my will
- ☐ Other (please describe) Description of gift including any use designation or restriction \_\_\_\_\_

\_\_\_\_\_  
Approximate Current Value of Gift \_\_\_\_\_

Name(s) \_\_\_\_\_ Today's Date: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Email(s) \_\_\_\_\_

All inquiries and information about your plans will remain confidential. Please consult your professional advisor before making your plans. Please return this form to Sarah Zablocki-Axling, Development Manager at the address below. Thank you!

**Jefferson Land Trust**

1033 Lawrence Street | Port Townsend WA 98368 | 360.379.9501 | [www.saveland.org](http://www.saveland.org)

tax ID 91-1465078