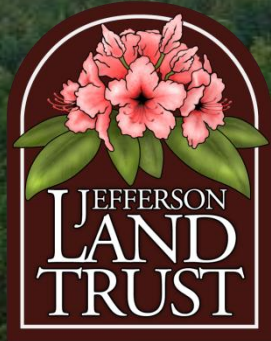


# LEAVING YOUR LEGACY WITH JEFFERSON LAND TRUST



## 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.

Making Jefferson Land Trust part of your planning is a simple yet powerful act. There are many ways to arrange a legacy gift.

# Benefit Jefferson Land Trust Through Your Legacy

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

## Unrestricted Gifts

Making an unrestricted estate gift allows the future Land Trust staff and board the flexibility to put your gift to immediate use where it will have the greatest impact.

### *Bequests*

The simplest and most common form of planned giving is a bequest in your will or revocable living trust. An example of basic bequest language: “I give [sum of money/specific asset/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 its governing board for the support of land protection and conservation in Jefferson County.”

As indicated above, through bequest language in a will or revocable living trust instrument you can either opt to give a particular dollar amount, securities, or real estate or you can donate a percentage of your residuary estate (i.e., what remains after other bequests have been made and estate expenses have been paid).

## Restricted Gifts

If you would like to focus your estate gift, you can choose to restrict it to one of the following project areas:

### **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 [sum of money/specific asset/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 its governing 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 in order to preserve 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.



*Legacy is not  
what I did for  
myself. It's  
what I'm doing  
for the next  
generation. –  
Vitor Belfort*

*Sample bequest language: "I give [sum of money/specific asset/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 its governing 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 provide native habitat for plants and wildlife and recreational trails, scenic beauty, and a natural refuge for residents and visitors. While helping to keep the air and water clean and sequester carbon, 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 [sum of money/specific asset/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 its governing 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 required for that purpose will always be available. 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 [Forever Fund Operating 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 [sum of money/specific asset/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 its governing board for the support of Jefferson Land Trust's Long-Term Stewardship Fund/Education Programs/Forever Fund 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.

## 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.

### 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:

- **IRAs and Qualified Retirement Plans (Such as 401(k) and 403(b) Plans:** Using a form provided by the custodian of the IRA or the qualified plan, simply fill in the blanks to name Jefferson Land Trust, tax ID 91-1465078, as a primary or contingent beneficiary for all or a portion/percentage of whatever remains at the end of your life. Your gift will avoid probate and will not be subject to any income tax or estate tax, as could be the case if you made the gift to family members of other individuals. **Note:** If you are age 70-1/2 or older, you can instruct the custodian of certain types of IRAs to distribute up to \$100,000 annually directly to Jefferson Land Trust without any of the distribution being subject to income tax. If you are age 72 or older, any such distribution can be counted against your required minimum distribution amount.
- **Bank/Brokerage 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 policy's death benefit. In some cases, it can also make sense for tax and other reasons to transfer ownership of a policy to Jefferson Land Trust during life.
- **Charitable Trusts:** There are several different types of trusts that allow you to benefit not only Jefferson Land Trust, but also yourself and/or family members or other individuals while securing various tax benefits. Please consult your attorney.
- **Annuities:** Jefferson Land Trust can be named as the beneficiary of an annuity issued by an insurance company by completing a form provided by the company, and this may result in tax benefits. Separately, even though Jefferson Land Trust does not issue charitable gift annuities, it can sometimes be possible to work with another charitable organization in order to benefit the Land Trust through a gift annuity. 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.

**Note: Real Estate and Tangible Personal Property** - Jefferson Land Trust accepts gifts of many types of real and personal property, including residential or commercial property and working farms or forests. Gifts of property require initial review by our board; please contact us to learn more.

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 plan.

## Contact Us

For further information, or to discuss including Jefferson Land Trust in your estate plan, 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 other 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 bequest or other gift to Jefferson Land Trust.

## Get Started Today

Do you have an IRA, 401(k), life-insurance policy, or any other assets not included in your will? If so, these are called non-probate assets and you must plan your beneficiaries for them separately. [Use this online tool to designate Jefferson Land Trust as beneficiary of these assets.](http://www.saveland.org/save-land/planned-giving) ([www.saveland.org/save-land/planned-giving](http://www.saveland.org/save-land/planned-giving))

## Begin Your Legacy With Us

To help you get started on your plans and legacy, we've teamed up with FreeWill, which offers a [complimentary online tool that guides you through the process of creating your will or trust](http://www.saveland.org/save-land/planned-giving). It's easy to use, accessible online, and simple wills can be completed in about 20 minutes. This service is offered without any obligation to include charitable giving in your plans, and details of your gift will not be shared with Jefferson Land Trust, unless you permit them to be. ([www.saveland.org/save-land/planned-giving](http://www.saveland.org/save-land/planned-giving))



## Have you already included Jefferson Land Trust in your Legacy Plan?

If so, [please fill out this form \(www.saveland.org/save-land/planned-giving\)](http://www.saveland.org/save-land/planned-giving) to let us know! We'd love to thank you for your generosity and keep you updated on our plans and progress as a member of our Land and Legacy Circle.



Photo Credits – John Gussman and Wendy Feltham

*Thank you for including Jefferson Land Trust in your estate plan!*