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YOUR GIFT  
**TO FUTURE  
GENERATIONS**







**Your love for  
THE  
LAND**

*Land = Legacy*

## WHY BECOME A LEGACY DONOR?

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Thank you for your interest in including the Land Trust of Santa Cruz County in your estate plan. Legacy donors direct a portion of their estate to support our future work protecting, caring for, and connecting people to the extraordinary lands that make Santa Cruz County special.

A legacy gift is a profoundly significant statement about your passion for protecting the wildlife and wildlands of Santa Cruz County. Your legacy gift will help ensure that the land you care about now will be forever protected and enjoyed by future generations.

Anyone can make a legacy gift. By designating the Land Trust to receive assets in the future, you are making a gift that won't detract from your current lifestyle or family security.

There are a variety of ways you can make a legacy gift to the Land Trust. We encourage you to consult your advisors regarding your financial, legal, or tax needs to ensure that your gift fits into your overall circumstances and plans.

Over the years, members have made Legacy gifts, both small and large. Each gift is unique to the member who made it, and each will have a meaningful impact on our work for years to come.

# HOW DO I MAKE A LEGACY GIFT?

## Include a Bequest in Your Will or Living Trust

You can name the Land Trust as a beneficiary of your will or living trust. A bequest is easy to arrange, costs nothing during your lifetime, and the bequest remains in your control. You can change your mind at any time or modify your future gift should circumstances change.

You can structure your bequest to leave a percentage of your estate, a specific dollar amount or item (including real estate), or the balance or residue of your estate after gifts to family and friends.

To include the Land Trust as a beneficiary of your will or living trust, we suggest you use the following language:

"The Land Trust of Santa Cruz County, a California non-profit corporation, with the business address of 911 Center Street, Santa Cruz, CA 95060 and taxpayer identification number of 94-2431856."

## Real Estate

Making a gift of real estate to the Land Trust can reduce your taxes and ease the demands of owning property. The Land Trust accepts two types of real estate gifts: conservation lands, which the Land Trust will retain, and properties intended for sale. If you intend to restrict the use or sale of your gift property, please contact our office to ensure that we can fulfill your wishes.





# HOW DO I MAKE A LEGACY GIFT?

## **Make a Gift of Your IRA or Other Retirement Assets**

Naming the Land Trust as a beneficiary of your retirement plan is easy. Designation usually can be done (or undone) online without the expense of an attorney. If left to family members, retirement funds can incur hefty income taxes but are tax-free if left to a charity. Many financial advisors suggest that you gift your retirement plan assets to charity and use your will or living trust to pass other assets that are not as highly taxed to your heirs.

Potential Advantages:

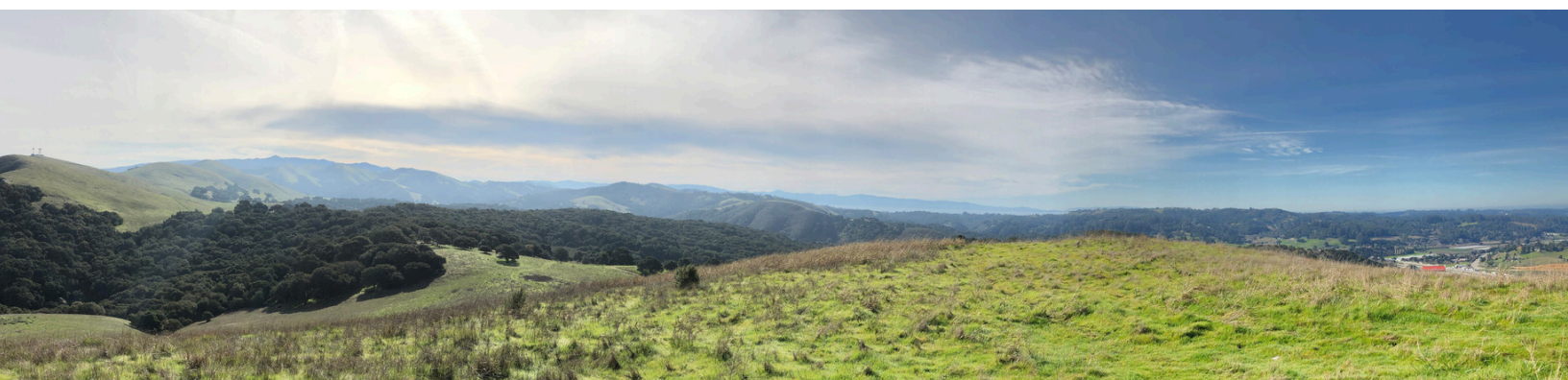
No income tax need be paid on funds transferred directly to a charity, so the full amount of your gift is available to assist the Land Trust.

Designation can be done (or undone) online, without the expense and bother of using an attorney.

Since your gift is expressed as a percentage, it will keep pace with increases or decreases in the value of your retirement account. automatically fall in value as you withdraw funds from your retirement account and your overall estate is diminished.

## **Designate the Land Trust as a Beneficiary of Your Life Insurance Plan**

Naming the Land Trust as a beneficiary of your life insurance plan is straightforward and can be done (or undone) anytime using a "change of beneficiary" form from your insurer and without the expense of an attorney.





## HOW DO I MAKE A LEGACY GIFT?

### **Receive Lifetime Income through a Charitable Gift Annuity or Charitable Remainder Trust.**

Make a gift that provides regular payments to you or others for life. Your gift can be funded with cash, stock or real estate, and any capital gain taxes are deferred or forgiven. You are also entitled to an income tax deduction for a portion of the value of your gift. After your lifetime(s), the remaining gift balance will be donated to the Land Trust.

Questions? Please contact Engagement Director, Laura Dannehl-Schickman, at 831-588-8209, or [laura.schickman@landtrustsantacruz.org](mailto:laura.schickman@landtrustsantacruz.org).

**Thank you for considering the Land Trust as a part of your legacy. Knowing that you share our values for the land and trust our ability to do this work is the greatest gift we could ever receive.**





*Love for the Land*

## WELCOME TO THE LEGACY CIRCLE

Making a Legacy Gift welcomes you into our Legacy Circle. We celebrate our Legacy Circle members during their lifetime through invitations to special Legacy and Conservation member-only events, special updates, and are recognition in Land Trust publications and on our Byrne-Milliron Legacy Wall.

If you'd like to remain anonymous but still participate in Legacy circle events, just let us know! We want to honor your gift in whatever way makes you comfortable.

To let us know your recognition preferences, please fill out the included confidential form and return it by mail or email to Donor Relations Manager, Cameron Berry, at 831-854-5878, or [cameron.berry@landtrustsantacruz.org](mailto:cameron.berry@landtrustsantacruz.org).







## Welcome to the Legacy Circle of the Land Trust of Santa Cruz County

Thank you for including The Land Trust of Santa Cruz County in your future plans. Our Legacy Circle donors are celebrated during their lifetime and receive program updates and invitations to field trips and other special events. To notify us of your planned gift, please complete and return this confidential form.

Date: \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

I have named the Land Trust in the following (check all that apply):

\_\_\_ My will or living trust \_\_\_ My retirement plan (IRA, 403(b), 401(k))

Other: \_\_\_\_\_

Some additional information about my future gift that I'd like to share with you:

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☐ YES. Acknowledge me as a member of the Land Trust's Legacy Circle.  
List me as: \_\_\_\_\_

☐ NO. I prefer to remain anonymous.

Please return or email to:

Laura Dannehl-Schickman, Engagement Director  
laura.schickman@landtrustsantacruz.org  
Land Trust of Santa Cruz County c/o Laura Dannehl-Schickman  
911 Center St, Santa Cruz, CA 95060





*Legacy Gifts to the Land Trust*

## THE LAND TRUST STRIKE AND STEWARDSHIP QUASI-ENDOWMENT

One of the largest hurdles the Land Trust faces in acquiring and protecting open space is time. Sellers are generally unwilling to wait for the Land Trust to fundraise the capital to purchase their land. The ability to move quickly is what allowed the Land Trust to protect land on either side of Laurel Curve—the pivotal first step in creating the HW17 undercrossing. The second largest hurdle is the continued cost of maintaining and stewarding the growing list of properties we have protected (16,000 acres and growing).

As part of the Land Trust's recent strategic plan, we have identified over 6,000 acres of critical properties within the wildlife corridor that stretches from the Santa Cruz mountains to the Gabilan Range in the south. There are 500 acres of endangered species habitat that are at risk of development across the county. The need is clear and will drive our work for years to come.

The Land Trust has created a quasi-endowment that will create a self-sustaining source of funding that assures our ability to continue protecting and restoring our county's wild and working lands for decades to come. This quasi-endowment will allow the Land Trust to:

- Utilize “strike now” funds to move quickly when land opportunities present, allowing the Land Trust to replenish the endowment's core capital through fundraising, government grants, or conservation easements without risk of losing the property.
- Fund ongoing habitat restoration and management across the Land Trust's growing acres of open space.
- Support the purchase of conservation easements to protect our county's farm and ranch lands from development.

To designate your gift to the Land Trust Strike and Stewardship Quasi-Endowment, we suggest adding the following language to your bequest:

*“This bequest is designated for use in funding the Land Trust of Santa Cruz County's Strike and Stewardship Fund, a quasi-endowment which will support the protection and stewardship of open space throughout the Santa Cruz County”*