

GIVE MOR



Make a legacy gift to Museum of the Rockies

As a long-term supporter of our community museum, you know that when a child stands toe-to-toe with a *T. rex*, something magical happens. Whether you've attended the openings of our changing exhibits, volunteered at our Living History Farm, or served as a docent, you know first-hand how many lives we've touched.

Open the door to even bigger giving to support an organization that you already hold dear. Using our new Planned Giving program, you now have a powerful tool to make a longer-term statement of support for an organization that ignites the imagination of community members, from children to grandparents.

Planned gifts can help you with effective tax reduction strategies while ensuring that the Museum can generate the resources needed to carry out our programs. By combining charitable giving with your financial and estate planning, you will create a personalized, lasting legacy. Planned giving can be as straight-forward as including a bequest to MOR in your will. Other more sophisticated options, such as charitable gift annuities, offer guaranteed income and substantial tax savings. You can also take advantage of a special program called the Montana Endowed Tax Credit, which helps you save money on taxes while helping the Museum build our endowment fund, which works like a "piggy-bank" to ensure the Museum's future.



BEQUESTS

Bequests have made a big difference to our community museum, allowing us to expand our facility and programs. You may name MOR in your will. You can specify a simple amount, a percentage of your estate, or what remains of your estate after you have provided for your children or other beneficiaries. In order to ensure that your gift will be exempt from federal estate taxes, you will want to include our organization's identification number (EIN 81-6016828). And please let us know that you've made this single powerful decision – we want to thank you and include you in events and recognition through our Heritage Society!

GIFT ANNUITIES

In exchange for a gift of cash or securities, the Museum will offer you quarterly fixed-income payments for life. You will reap tax benefits for a portion of the annuity. We will work directly with your financial adviser or lawyer to draw up a contract.

TRUSTS

Using a “charitable lead trust,” you can pass assets to family members while making a gift to MOR. Income goes to the Museum for a certain term (minimum 10 years) and at the term's end, the remaining assets pass to family members at a tax benefit to you. Using a “charitable remainder in trust,” in exchange for a gift placed in trust, the Museum offers regular payments based on a fixed percentage of the trust's value. The gift offers lifetime income.

OTHER WAYS TO LEAVE A LASTING LEGACY

Naming MOR as a beneficiary of the surrender value of your life insurance is another easy way to give. Some thoughtful donors have also made contributions in the form of retirement accounts or distributions from a 401K account when income is not needed, creating a win-win solution while helping us carry out more of our mission. Gifts of appreciated stock, real property or parts of your estate are other ways to give.



GIVE MOR

I am interested in the Museum's planned giving program.

Name _____

Email _____ Phone _____

Mailing Address _____

City _____ State _____ Zip _____

Preferred method of contact ☐ Email ☐ Phone ☐ Mail

I would like more information about:

☐ Bequests ☐ Gift Annuities ☐ Trusts

☐ I've already included Museum of the Rockies in my estate plans.



The Tinsley House at MOR's Living History Farm



We ask you to consider taking the next step, exploring planned giving opportunities with our Director of Philanthropy, Kathryn Hohmann.

You can reach her at 406-994-2682 or
by email at Kathryn.Hohmann@montana.edu

MOR Tax ID number: 81-6016828

MUSEUM_{OF}
THE ROCKIES

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