



PLANNED
GIVING



LAND & TRUST



PRICKLY PEAR
LAND TRUST

connecting land and people

Kevin League

TRUST IN MONTANA'S LAND & PEOPLE

PRICKLY PEAR LAND TRUST began in a living room in Helena, Montana, when neighbors joined forces to protect our community's mountain backdrop. That small group evolved into a conservation organization that shapes the many connections between land and people in Montana. Since 1995, Prickly Pear Land Trust has protected over 20,000 acres of land, built the South Hills trail system, opened community parks, and grown an education program serving thousands of students yearly.

WE ARE DOERS FIRST, DREAMERS SECOND. From our trail volunteers to our board president, we are dedicated to connecting people with land. We build trails and parks, protect land and viewsheds, help farmers and ranchers thrive, restore waterways and wetlands for wildlife habitat, educate children and adults so they can be stewards of nature, and donate land to the public. We do this work so that every generation can work the land, enjoy open spaces, wonder at nature, and give back to the places they love.

TRUST IS OUR FOUNDATION. For 30 years, we have focused on being steadfast neighbors. We are responsible, responsive, and respectful in all of our endeavors. If you seek to leave a legacy that connects land and people, we will be your trusted partner.

"You know you're onto something when you can honor the past, the present, and the future all at once."

– Enger family

Estate Giving

WILLS AND BEQUESTS

Include Prickly Pear Land Trust in your will by allocating a specific amount or percentage of your estate to PPLT. You may also specify that the remaining funds will go to PPLT after your beneficiaries have been provided for.

Legal Designation and Sample Wording:

"I hereby give and bequeath (amount or percentage of your estate, residuary share, or other assets) to Prickly Pear Land Trust, 40 W. Lawrence, Suite A, Helena, MT 59601, for general purposes."

Tax ID number:
81-0506868

RETIREMENT PLANS

You can also leave all or a portion of your retirement plan to Prickly Pear Land Trust. Designate PPLT as the beneficiary of your IRA, 401(k), or other qualified retirement plan. Beneficiary designations can be changed or revoked without penalty, and your regular lifetime withdrawals will not be affected. A retirement plan designation avoids the double taxation your retirement savings would incur if left to your heirs.

LIFE INSURANCE

Gifts of life insurance enable you to make a gift by transferring ownership of a new or existing policy to Prickly Pear Land Trust. The process to set this up is simple and inexpensive. The gift is valued at the cash surrender of the policy.

PLANNED GIFT TAX CREDIT

The Montana charitable endowment tax credit provides individuals and businesses a credit against state income tax liability of 40% of the value of any planned gift to the endowment of a Montana charity.



Emily Winn



Kevin League

"Prickly Pear Land Trust accomplishments are good for people and wildlife and perpetuate the attributes of this area that make it a fabulous place to live and thrive."

— Youmans Family

Lifetime Giving

REAL ESTATE GIFTS

Gifts of real estate can contribute to our mission in many ways. Land, homes, condos, and rental properties can help us connect land and people through conservation, recreation, and education. When you donate real estate, 100% of its value benefits Prickly Pear Land Trust since no capital gains will be assessed, while you receive an income tax deduction and avoid estate taxes.

CHARITABLE GIFT ANNUITIES

In exchange for a gift of cash, securities, or real estate, Prickly Pear Land Trust can pay you or your beneficiary an annuity. The annuity can be immediate or deferred and can provide substantial income and estate tax benefits.

CHARITABLE TRUSTS

A charitable lead trust pays income to Prickly Pear Land Trust for a period of time, and at the end of the term, the remainder is returned to either you or your heirs. A charitable remainder trust pays income to a designee until a specified date, and then the remaining assets are paid to Prickly Pear Land Trust.

IRA DISTRIBUTION

The Individual Retirement Account Qualified Charitable Distribution allows you to make a direct distribution from your IRA account to support Prickly Pear Land Trust. If you are 70½ or older, you may transfer up to \$100,000 from your IRA directly to Prickly Pear Land Trust. These gifts are not taxable and qualify toward your required minimum distribution at age 72 or greater.

MONTANA COMMUNITY FOUNDATION

The Montana Community Foundation encourages charitable giving to qualified endowments by offering a tax credit to Montana taxpayers. Prickly Pear Land Trust's endowment provides stable funding for operating expenses. Through this unique incentive, a person, business, or organization can reduce their state income tax up to \$10,000 per year.



Edwin Glass Photography

"I believe in land protection and trails. They're healthy for people and good for our economy."

– Jim Utterback



CONSERVATION IS YOUR LEGACY

With the help and support of our neighbors, farmers and ranchers, volunteers, and trail lovers, Prickly Pear Land Trust has helped make conservation a household value in our corner of Montana. Your planned gift will ensure that future generations can work the land, enjoy open spaces, wonder at nature, and give back to the places they love.

SHARE YOUR PLANS

Please let us know if you have included Prickly Pear Land Trust in your estate plans. We would love to record your generous gift and thank you properly for it. The more we know about your gift during your lifetime, the better we can ensure that plans are in place to honor your wishes when you are no longer with us.

LEGAL LANGUAGE AND TAX ID

For all legal purposes, please refer to our organization as:

Prickly Pear Land Trust
40 W. Lawrence, Suite A, Helena, MT 59601

Tax ID number: 81-0506868

Information provided in this document is not intended to be tax or legal advice. Please consult with your investment planner or accountant before you make decisions about a charitable gift.

Connect with Us

PLEASE REACH OUT TO US

We're here to help you leave a legacy that benefits you, your loved ones, and Prickly Pear Land Trust. Please call, email, or stop by our office at any time.



Rachel Rountree
Associate Director
rachel@pricklypearlt.org
512-299-6854

OUR MISSION is to inspire connections to the landscapes, water, wildlife, recreation, and working ranches of west-central Montana through conservation, now and for future generations.

pricklypearlt.org

40 W. Lawrence, Suite A
PO Box 892, Helena, MT 59624

406-442-0490



**PRICKLY PEAR
LAND TRUST**

connecting land and people