



## JOIN THE LEGACY CIRCLE

### Supporting watershed health

The Luckiamute and Ash Creek watersheds are natural resource jewels in the heart Oregon's Willamette Valley. Dedicated volunteers and financial supporters are at the core of our mission. Your generous contributions of time and money are what make our work possible and successful.

You can help protect this special place we call home by joining the **Luckiamute Watershed Council Legacy Circle** — making an enduring contribution to the LWC through a philanthropic tool known as planned giving. It's a remarkable type of deferred giving that can help you make a larger gift than you ever thought possible while at the same time receiving significant tax and financial benefits.

Read on to find out how you can provide a legacy of watershed health for future generations.

### Types of gifts you can make to LWC

Your generosity may come in the form of a beneficiary designation through your will or estate plan. You may make an *unrestricted* gift, which frees the LWC to use funds where they are most needed. Or, you may make a *restricted* gift by designating a specific use of bequest funds, provided your request is consistent with the mission and priorities of the LWC.

### How we each benefit

Through your generosity, you will leave a legacy to the LWC, and by extension, to current and future generations who work, reside, and play in the watershed. The LWC will benefit by becoming a stronger organization, able to expand our education and outreach activities, as well as to implement more natural resource enhancements and protections across our service area.

We acknowledge all gifts on our website and in various publications. However, per your request, we can recognize you or your estate, show the gift as being made in honor/memory of someone, or show it as anonymous (*see Bequest Intention Form*). If you choose to publicly acknowledge your gift, your generosity will inspire other potential donors.

*These materials are for informational purposes only and not for the purpose of providing legal or financial advice. The Luckiamute Watershed Council encourages all donors to consult with their financial planners or attorneys. All documentation of planned giving will be held in confidence. No information other than the donor's name — if permission is granted — will be shared. For more information, please contact Kristen Larson, Executive Director, (503) 837-0237.*

## LEGACY GIFTS

One of the simplest ways to create a legacy of watershed health is by making a **general bequest** or a **bequest of retirement assets** in a new will or estate plan, or as a codicil to an existing will or estate plan. You will need to work with an attorney to craft your legacy.

### General Bequest

A bequest is a cash gift provided for through your will or estate plan. It allows you to leave a generous gift without affecting your income or assets during your lifetime.

Working with your attorney, you can designate a cash gift to the LWC that is either a set dollar amount or a set percentage of your estate or of the residual of your estate.

As a designated beneficiary, the LWC receives your gift when your estate is settled. The amount that passes to the LWC will reduce any estate taxes upon your death. These tax savings can be substantial to your heirs.

### Bequest of Retirement Assets

An alternative to a general bequest is to designate a qualified charity as the beneficiary of all or a portion of the estate's remaining retirement assets (IRA, 401(k), profit sharing, or pension plan).

If you leave your retirement assets to heirs other than your spouse, they will be subject to income tax due from your heirs when they receive the funds. Moreover, the IRS requires your heirs to withdraw those distributions over the next 10 years, potentially pushing them into higher tax brackets. Instead, it may be beneficial to leave other types of assets — cash, securities, mutual funds, real estate — to your heirs and give the more heavily taxed retirement assets to a qualified charity.

By designating a qualified charity like the LWC as the beneficiary of all or a portion of your remaining retirement assets, the gift is tax free to the LWC.

## How to leave a legacy to the LWC

The following language may help you and your attorney in preparing your bequest to the LWC. This language is not intended as legal or financial advice.

I hereby give to the Luckiamute Watershed Council, an Oregon nonprofit corporation (EIN: 45-2177036), located in Independence, Oregon,

[if making an **estate bequest**]:

The sum of \$ \_\_\_\_\_ to be distributed outright and free of trust.

or

\_\_\_\_\_ percent of the rest, residue, and remainder of my estate.

[or, if making a specific **bequest of retirement assets**]:

The balance of my [IRA, 401(k), profit sharing, or pension plan, whichever apply].

For either type of bequest, you may also include:

- An *unrestricted request* (. . . for use where the LWC determines the need is greatest, or . . . for use at the Board of Director's discretion), or
- A *restricted request* (" . . . for the education and outreach program, or . . . for the restoration program, or . . . for the monitoring program"), or
- A *contingent request* ("If my spouse does not survive me...").

And, if you are willing to do so, please let us know of your philanthropic plan for the LWC either by providing a copy of the relevant portion of your will or estate plan, a brief explanatory letter, or by completing the [Bequest Intention form](#).

# Bequest Intention Form

Thank you for considering the LWC in your bequest. If you choose to complete this form, please do so and return to the Luckiamute Watershed Council, 165 D St., Independence, OR 97351 or email a scanned copy to [director@LuckiamuteLWC.org](mailto:director@LuckiamuteLWC.org).

As a strong supporter of the Luckiamute Watershed Council, I am/we are pleased to pledge and document this planned gift:

Your Name(s): \_\_\_\_\_

The current estimated value of this bequest: \$\_\_\_\_\_ (optional)

Please check all that apply:

- The gift is a fixed dollar amount specified in my will or estate plan
- The gift is a percentage of the rest, residue, or remainder of my estate
- The gift is some or a portion of my remaining retirement assets at the time my estate is settled

This gift is:

- Unrestricted to the LWC
- Restricted to \_\_\_\_\_ (must be consistent with our mission and priorities).

Acknowledgment instructions:

- Please recognize me/us annually as: \_\_\_\_\_
- Please show this gift as made in honor/memory of: \_\_\_\_\_
- Please consider this gift anonymous.

Please sign and date below and thank you for remembering the LWC in your planned giving!

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

*The Luckiamute Watershed Council encourages all donors to consult with their financial planners or attorneys. All documentation of planned giving will be held in confidence. No information other than the donor's name — if permission is granted — will be shared. For more information, please contact Kristen Larson, Executive Director, (503) 837-0237.*