



Creating a Legacy of Land Conservation

For nearly 40 years, the generosity of private individuals like you has been the heart and soul of the Southern Oregon Land Conservancy's efforts to protect the cherished natural areas, wildlife habitats, and vital waterways of the Rogue River region.

Planned giving can be a powerful tool for future lands protection. It also has the potential for having a more meaningful impact over the long term. Depending on how your gift is structured, you can also easily change your planned gift intention (e.g., modifying your will in order to increase, decrease, or revoke your gift) based on unforeseen life circumstances.

If you choose to make a planned gift to the Southern Oregon Land Conservancy, you will be creating a lasting legacy that preserves the character, diversity and beauty of this unique and beloved area of Southern Oregon—ensuring that the magnificent views, salmon streams, native habitats and working farmlands that we enjoy today will endure forever.

Ways to Make a Planned Gift

The following summary provides several examples of ways to make a planned gift. It is not intended, however, to be comprehensive. There are many ways to make a charitable gift through your estate plan, and it is important to consult with a qualified financial planner, or attorney, in order to identify which method fits best with your specific goals. Here are some options to consider:

Bequests

Naming the Southern Oregon Land Conservancy in your will, or bequest, can be accomplished through a very straightforward process—it is also the most popular way to make a planned gift due to its simplicity and high degree of adaptability.

For example, you can make an outright gift in your will that designates a specific dollar amount or percentage of your estate to be donated to the Southern Oregon Land Conservancy. You can also name us as a remainder beneficiary where we receive a residual distribution of your estate after specific assets have been allocated to your primary beneficiaries. It is uncomplicated and easy, as well, to identify us as a beneficiary in your existing will through a simple amendment called a codicil.

Cash

You can provide immediate support to the Southern Oregon Land Conservancy, allocate assets, and receive a charitable deduction, during the current fiscal year, through an outright gift of cash.

Gifts of Stock

You may receive a significant tax break from the IRS by donating appreciated securities now, rather than later. Donating stock that you have owned for one year or longer, typically offers two major tax benefits: you receive an income tax deduction for the fair market value of the stock, and you avoid paying any capital gains tax that you have accumulated; you also receive a gift credit / income tax deduction for the fair market value of the securities you donate on the date of transfer—rather than their original (lower) price.

IRAs and Pension Plans

You may save both income taxes and estate taxes by making the Southern Oregon Land Conservancy a beneficiary of your individual retirement account, pension, 401(k), or other retirement savings plan. For example, you may want to consider donating a highly-taxed asset to the Southern Oregon Land Conservancy, while leaving a more favorably taxed asset to your heirs.

Gifts of Real Estate

You can also make a substantial gift through a transfer of real property. The Southern Oregon Land Conservancy accepts two types of property—both of which are vital to our mission—as follows:

- **Land that you would like to see permanently protected.** We carefully evaluate the conservation values of donated land before accepting property for conservation. The decision to accept or decline land for conservation is made by our Board of Trustees based on a formal policy that evaluates costs, risks, etc.
If you are interested in making this type of gift, please contact us for more detailed information.
- **Real estate that you donate to the Southern Oregon Land Conservancy for resale.** We classify these type of gifts as "trade lands" and we utilize them to generate income that supports our work. Examples of donated real estate include first and second homes, parcels of land, apartments, and retail buildings.

Life Insurance

You can make a tax-deductible gift of whole or universal life insurance by naming the Southern Oregon Land Conservancy as an owner or beneficiary of your policy. You may want to purchase a new policy and list us as a beneficiary, or you may want to donate a policy that you currently own but no longer need. It is important to consult with your insurance agent regarding your best options.

If you are thinking about any of the options listed above or would like to learn more about Charitable Lead Trusts, Charitable Remainder Trusts, and Charitable Gift Annuities, please consult with your financial planner or estate attorney.

For more information about our planned giving program contact Executive Director, Cathy Dombi, at 541-482-3069 ext. 102 or email, cathy@landconserve.org. **Thank you!**