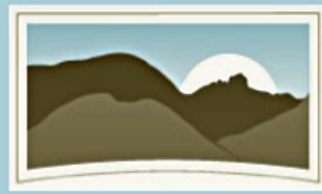




Love Helena, Now and Forever

*Make a lasting impact in the greater Helena area with
a community-centered pledge or legacy gift*





HELENA AREA
COMMUNITY
FOUNDATION

Giving

The Helena Area Community Foundation (HACF) accepts a wide variety of assets and can facilitate simple and complex forms of giving.

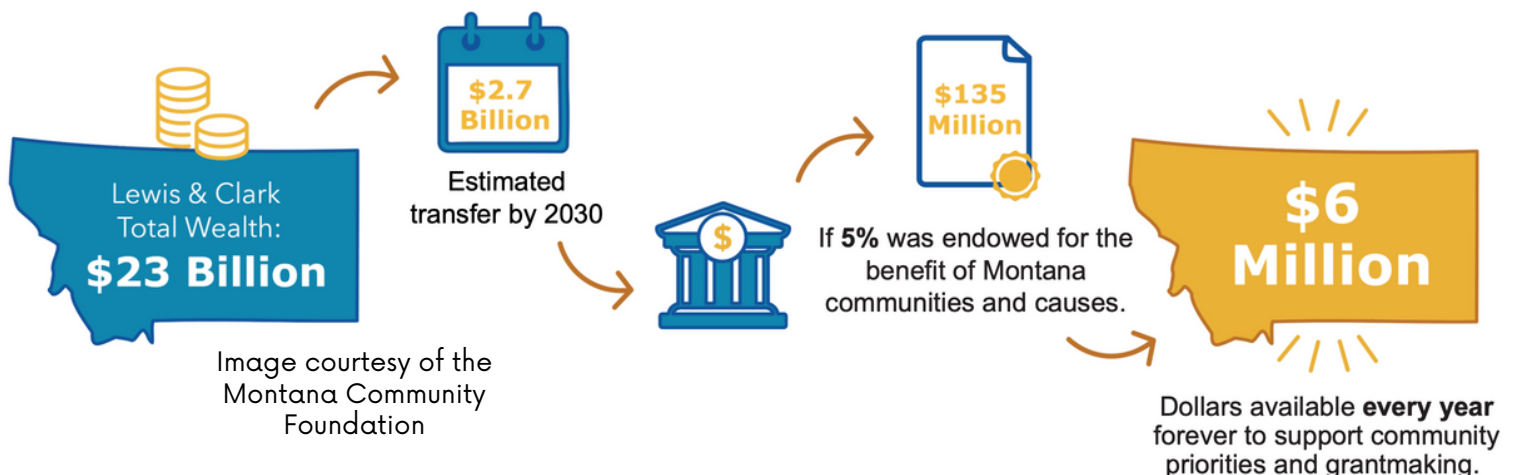
HACF is committed to preserving a source of funding for our community that is permanent. To do this, HACF can accept donations of: cash, publicly traded securities, closely held stock, interest in limited partnerships, life insurance policies, retirement accounts, and private foundation assets, as well as bequest gifts and recurring pledges, such as those made through the Now and Forever campaign. See the following pages for information on how to designate a legacy gift or participate in the Now and Forever campaign

Additionally, online donations and recurring monthly donations can be made online at www.helenaareacommunityfoundation.org.

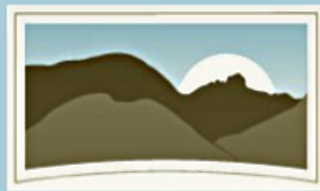
Endowment Gifts

Growing HACF's endowments creates increased funding for our communities each and every year, for projects including grant making and emergency relief funding.

The transfer of wealth between generations of Montanans could account for as much as **\$2.7 Billion by 2030 in Lewis and Clark County alone!**



If just 5% of this transferred wealth was endowed at HACF, \$6 Million would be available every year to support community projects in the greater Helena area.



HELENA AREA
COMMUNITY
FOUNDATION

Wills, Bequests, and Sample Language

Thank you for confirming your intention to include the Helena Area Community Foundation in your will or estate plan. Your gift will inspire and lead collaboration and investment for compassionate, safe, healthy, and resilient communities in the greater Helena area.

A bequest is given by designating the Helena Area Community Foundation as the beneficiary in your will or trust. If you are interested in naming Helena Area Community Foundation in your estate, below is basic information that will help us to recognize your generous gift.

Information and Bequest Language:

Name: Helena Area Community Foundation

Address: PO Box 92
Helena, MT 59624

Tax ID#: 81-0536902

Language for a general bequest:

I give and bequeath to the Helena Area Community Foundation the sum of \$_____ (or %) for the use and benefit of all of its locations, or its successors in interest.

Language for a specific location bequest:

I give and bequeath to the Helena Area Community Foundation the sum of \$_____ (or %) for the use and benefit of its (named) location, or its successors in interest.

Please note: This document does not bind you or your estate. By signing this form you are simply acknowledging your current intention to include HACF in your estate plan.



♥ If you name HACF in your estate, please provide a copy of the document that names HACF as a beneficiary,

OR

♥ Simply fill out an Intention of Legacy Gift to ensure your philanthropic goals are respected and upheld.

Formally documenting your bequest with us allows HACF to build a relationship with you and identify and understand your legacy intentions, and allows you to join the Love Helena Forever Society, a group of like-minded, community-centered champions who have made legacy contributions to the greater Helena area through HACF.

For questions and further information about any of the giving options mentioned, please contact:

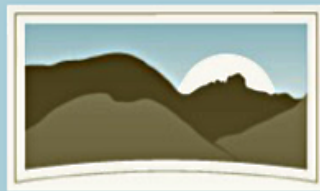
Emily Frazier, Executive Director
Helena Area Community Foundation
PO Box 92, Helena, MT 59624
406-441-4955
emilyf@helenaareacommunityfoundation.org

*This information is not intended to be perceived as legal, tax, or financial advice by the Helena Area Community Foundation or any of its personnel. This brochure is intended for informational purposes only and is not intended as a solicitation. Please consult with your legal and financial advisor(s) when considering establishing a charitable legacy. HACF is a Montana non-profit organization. Gifts to HACF's endowment may qualify for the Montana Endowment Charitable Tax Credit.

Thank you for your commitment to HACF and the greater Helena community!

Please mail this form and any supplemental documentation to HACF, PO Box 92, Helena MT, 59624. For more information, or questions, please contact Emily Frazier at 406-441-4955 or emilyf@helenaareacommunityfoundation.org.

Tax ID/EIN: 81-0536902



HELENA AREA
COMMUNITY
FOUNDATION

Intention of Legacy Gift

Thank you for confirming your intention to include the Helena Area Community Foundation in your estate plan. Your gift will inspire and lead collaboration and investment for compassionate, safe, healthy, and resilient communities in the greater Helena area.

Please provide as much information as you feel comfortable sharing so we can document your generous intentions. Any information shared will remain confidential and does not create a binding obligation to you or your estate.

Name(s) _____

Address _____

City/State/ZIP _____

Phone number _____

Email _____

I/We have included HACF in the following way(s):

☒	GIFT VEHICLE	PERCENTAGE	OR	ESTIMATED VALUE OF GIFT
☐	Will			
☐	Trust			
☐	Retirement Account			
☐	Life Insurance			
☐	Bank Account			
☐	Brokerage Account			
☐	IRA			
☐	Real Estate			
☐	Other: _____			

As directed in my current documentation, I/we designate this gift for the following:

- ☐ Area of greatest need.
- ☐ HACF Permanent Endowment.

To recognize our generous donors who have named HACF in their estate plans, we established the Love Helena Forever Society. By providing us notification of your intent, we would like to extend an invitation for you to join the Love Helena Forever Society.

- ☐ I/We wish to accept the invitation to become member(s) of the Love Helena Forever Society.
- ☐ I/We wish to remain anonymous
- ☐ As a Love Helena Forever Society member, this future gift will be made in honor or memory of: _____

Please find attached a copy of my:

- ☐ Will ☐ Trust ☐ Beneficiary Designation Form _____

Signature_____ Date_____

Signature_____ Date_____

*This document does not bind you or your estate. By signing this form you are simply acknowledging your current intention to include HACF in your estate plan.

Thank you for your commitment to HACF and the greater Helena community!

Please mail this form and any supplemental documentation to HACF, PO Box 92, Helena MT, 59624. For more information, or questions, please contact Emily Frazier at 406-441-4955 or emilyf@helenaareacommunityfoundation.org.

Tax ID/EIN: 81-0536902

Now and Forever Campaign

The Helena Area Community Foundation inspires and leads collaboration and investment for compassionate, safe, health, and resilient communities. **Now and Forever.**

Participating in the Now and Forever Campaign entails a five-year pledge to the Helena Area Community Foundation, during which your annual contribution will transition from supporting our general operations to supporting HACF's permanent endowment.

At the end of five years, half of your total gift will have gone to the annual operating fund (Now) and the other half to the permanent endowment (Forever).

Participation in this campaign is one of the most influential ways you can support your local community foundation. In short, your five-year pledge will have benefited our community now and forever. To join, simply contact our office, or send your initial gift with "Now and Forever Campaign" in the memo line, and HACF staff will contact you!



HELENA AREA
COMMUNITY
FOUNDATION

NOW AND FOREVER CAMPAIGN



General Operating Budget



Endowment



100% of your gift goes to HACF's General Operating Budget



75% of your gift goes to HACF's General Operating and 25% goes to the Endowment



50% of your gift goes to HACF's General Operating and 50% goes to the Endowment



25% of your gift goes to HACF's General Operating and 75% goes to the Endowment



100% of your gift goes to HACF's Endowment



**Thank you for your commitment to HACF and the
greater Helena community!**

For more information, or questions, please contact Emily
Frazier at 406-441-4955 or
emilyf@helenaareacommunityfoundation.org.

Tax ID/EIN: 81-0536902