



## Leaving a Legacy for Bears Ears FAQ



**The Bears Ears Partnership works to protect and build respect for the cultural and natural landscapes of the greater Bears Ears region.**

Including Bears Ears Partnership in your will, trust, or other tax-deferred giving vehicle is a powerful way to leave a lasting legacy. Giving through your will or estate plan empowers you to make a generous gift that you might not be able to give during your lifetime.

Anyone can give to Bears Ears Partnership through a will. The process is free, and you can change your mind at any time. Planned giving will have an enormous impact on the future of the Greater Bears Ears landscape, and help us continue to protect this landscape for generations to come.

**The following is information we hope can help you with your planning.**

**Legacy or bequest giving is done by leaving a gift in your will or estate plan.**

### Sample Bequest Language

I hereby give the [org name], a [insert state] charitable corporation, Tax Identification number [insert #] (hereinafter referred to as [org initials]), the following: the sum of \$ \_\_\_\_\_ OR \_\_\_\_\_ percent (\_\_\_\_%) of my estate OR \_\_\_\_\_ percent (\_\_\_\_%) of the residue of my estate. The [org initials] shall use this gift for the work of their mission.

A legacy or bequest gift is a gift that is given after the donor's lifetime. Giving through your will allows you to make a generous gift that you might not be able to give during your lifetime. Such a gift can have a huge impact on Bears Ears Partnership's ability to fund operational costs, key personnel salaries, and contribute to immediate fundraising needs.

### Everyone can make a bequest or legacy gift.

Legacy gifts are gifts that anyone, of any means, can offer. You do not need to be wealthy; it does not cost a thing, and you can change your mind at any time just by changing your will. The suggested language in the box to the right can help you and your advisors include our community in your will.

## Bequest gifts are essential sources of long-term support for the Bears Ears Landscape.

Bequests are often the easiest way to make a significant contribution toward continuation of our ground-level conservation and advocacy work, continue to expand our Visit With Respect education program, and support education outreach in schools in San Juan County, Utah.

### If you already have a will, giving a legacy gift is easy.

You can prepare a short document known as a “codicil” to your will, to be signed and dated in the presence of two witnesses who will not benefit from the change, and attach it to your will. See the box to the left for an example. Bequest gifts are easy to set up and require no up-front funds. You can also change them at any time.

### Leaving a retirement plan or part of an IRA is also possible.

This type of gift is also easy to make and can maximize benefits to you and our work. To make this gift, simply notify your plan’s administrator of your wish to change the beneficiary. A change of beneficiary form will be required.

**Bears Ears Partnership** can be a full or partial beneficiary of your plan.

### A gift through your life insurance policy is also possible.

You can name **Bears Ears Partnership** as the primary, partial, or alternate beneficiary of your life insurance policy by filling out a change of beneficiary form with your insurance company. Furthermore, if you no longer need the policy proceeds in your estate, you can transfer ownership of the policy to **Bears Ears Partnership**.

### You can also make a gift of real estate.

You can give your personal residence to **Bears Ears Partnership** and still maintain lifetime use of the property while benefiting from income and capital gains tax advantages. Please contact **Bears Ears Partnership** for more information.

### Be sure to consult an estate planning professional or tax attorney.

It is important to receive independent advice from professionals whom you know and trust. These can be attorneys who practice estate planning, accountants, financial planners, trust officers, insurance agents, stockbrokers, etc.

#### Sample Codicil

(date)

I, (name), a resident of the County of [county], State of [state], declare that this is the codicil to my last will and testament, which is dated [date original will signed]. I add or change said last will in the following manner:

[List all changes or additions to the original will. Reference each section number of the will and the specific language you will be affecting. Here is where you could include a bequest to the [insert org name]. See Sample Bequest Language on previous page to assist you.]

Otherwise, I hereby confirm and republish my will, dated [date original will signed], in all respects other than those herein mentioned.

I subscribe my name to this codicil this [day, e.g., 1st] day of [month], [year] at [full address where signed], in the presence of [full name of the first witness to codicil], and [full name of second witness to codicil], attesting witnesses, who subscribe their names here in my presence.

(you sign here) \_\_\_\_\_,  
Maker

#### ATTEST

On the date last above written, [name], known to us to be the person whose signature appears at the end of the codicil, declared to us, [full name of the first witness to codicil], and [full name of second witness to codicil], the undersigned, that the foregoing instrument, consisting of [number of pages of the codicil] page(s), was the codicil to the will, dated [date original will signed]; who then signed the codicil in our presence, and now in the presence of each other, we now sign our names as witnesses.

[Names, signatures, addresses, and date signed of two witnesses.]

**Your will is your legacy for a better world.**

If you choose to include **Bears Ears Partnership** in your estate plans, please let us know so that we can offer you our gratitude for your generous gift.

We also respect your wish if you prefer not to let us know, and offer you our deepest thanks.



**For additional information and assistance, please contact:**

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*Information provided here is meant as general information only. Bears Ears Partnership strongly advises you to seek legal and financial counsel when planning a legacy gift.*