A few things to consider about your estate...

If you are married, you and your spouse should each have a will of your own.

You should review your will from time to time, as it could become outdated.

...And some questions

- Who are the people and charitable interests you’d like to provide for in your will?
- What property do you own? What is its value? How is it owned? Do you have life insurance policies? Bank accounts? Retirement plans? (Gathering all your account information and social security number will make your attorney’s job easier, and can save you money!)
- Who will you ask for advice in making your estate plans?
- Who would you want to act as your estate’s representative? (And who is an alternate choice, in case that person isn’t available or doesn’t want to do it?) NOTE: a bank’s trust department or other fiduciary can also fill that role.
- Do you have minor children who will need to be cared for? Who will do be their guardian? Who will manage their property?

Where should you keep your will?

- Keep a signed copy in a location that’s safe – but accessible (with your attorney, with someone you trust, in a safe deposit box, in a safe at home).
- Your personal representative should know its location. Before storing your will in a safe deposit box, make sure your personal representative will be able to access it there.
- Keep an unsigned copy where it’s easily accessible so you can review it. (Write the location of the signed will on this copy.)

Do unto those downstream as you would have those upstream do unto you.

- Wendell Berry

LEAVING A LEGACY

Jack Neitz was a longtime science teacher in Laurel and a supporter of Northern Plains.

He had many conversations with his children about his desire to leave us part of his estate and, when he died in 2018, Jack included Northern Plains in his will.

His daughter Julie told us:

“We are all pleased about Dad’s support of Northern Plains.”

Why leave a legacy gift to Northern Plains?

- You will ensure that your values live on through Northern Plains’ work.
- If your bequest is directed to our Endowment Fund, it will sustain our work permanently!
- Making a bequest leaves your assets in your control during your lifetime.
- Your bequest is revocable... you can change beneficiaries at any time.
- Family first, charity second – you can provide for your loved ones and carry on the work you believe in.
- You can make a bequest in honor of someone special.
- You can make your bequest anonymously if you wish.

Northern Plains Resource Council
220 S. 27th St., Suite A • Billings, MT 59101
Tel: 406-248-1154 • www.northernplains.org
SUGGESTED BEQUEST WORDINGS

Remember, we are not attorneys...

Work with your legal advisor to determine the best language for you!

UNRESTRICTED BEQUEST

I give to Northern Plains Resource Council, a Montana nonprofit 501(c)(3) tax exempt corporation located at 220 S. 27th Street, Suite A, Billings, Montana 59101, [insert here the sum of money, or percent portion of the estate], to be used for its general purposes.

UNRESTRICTED BEQUEST FOR ENDOWMENT

I give to Northern Plains Resource Council, a Montana nonprofit 501(c)(3) tax exempt corporation located at 220 S. 27th Street, Suite A, Billings, Montana 59101, [insert here the sum of money, or percent portion of the estate], which bequest shall become part of a permanent endowment of which the principal is kept intact and only the income and/or growth expended, to be administered in accordance with policies established by the Council for its general purposes.

RESTRICTED BEQUEST

I give to Northern Plains Resource Council, a Montana nonprofit 501(c)(3) tax exempt corporation located at 220 S. 27th Street, Suite A, Billings, Montana 59101, [insert here the sum of money, or percent portion of the estate], to be used for [insert here the purpose for which the gift is to be used; e.g., to support a particular issue, to provide scholarships for persons who would otherwise be unable to attend training workshops, to bring key speakers or presenters to public appearances, etc.]

If in the future there is no longer a need for the funds so specified or it is unwise, in the judgment of the Board of Directors of the Council, to use the gift for the purposes specified above, then the Board of Directors may, in its discretion, use the gift to fulfill such other tax-exempt charitable objectives as it may designate, keeping in mind the objectives above set forth and keeping as close as possible to the original purpose.

BEQUEST THROUGH LIFE INSURANCE OR RETIREMENT ACCOUNT

(An attorney isn’t needed for this type of gift.)

You can name the Northern Plains Resource Council as a beneficiary for your retirement account, life insurance policy, certificate of deposit, bank account, brokerage account, or other assets. Simply request a beneficiary form from your financial institution and complete it.

INFORMING NORTHERN PLAINS

Your thoughtful plans mean a great deal to Northern Plains. Your gift will, over the years, provide a strong financial base to help us fulfill our mission in many ways. When you make a bequest to Northern Plains, we hope you will notify us so we can express our appreciation for your generosity and recognize it appropriately, and so we can ensure that we will be able to carry out the terms of your bequest.

Questions? Call us at (406) 248-1154

I’ve included Northern Plains in my will for the same reason I volunteer and support our efforts financially now: I know Northern Plains is effective in advocacy and in turning citizens into activists for air, land, water, and the betterment of our shared life...the really important things. I especially respect our commitment to democracy and to fact-based advocacy.

- Mary Fitzpatrick, Billings