Planned Giving:
A Gift Anyone Can Make

Together we can make a momentous impact on the future of Rocky Mountain National Park for generations to come.

We frequently hear stories of how Rocky has left a profound impression on our donors. Perhaps you also realize that Rocky means a lot to you, and you want to make sure those transformative experiences are available to future generations, but you're not sure how. Luckily, anyone can make a planned gift through their estate plans.

With a planned gift, you can take care of your family while at the same time helping to preserve and protect our beloved Rocky. In fact, we encourage you to include your loved ones and personal advisors, as well as Rocky Mountain Conservancy, in this important process. What an extraordinary way to express your values and demonstrate to your family the importance of philanthropy.

If you wish you could do more but are concerned about making a commitment you might not be able to keep, or making a gift with a financial asset you might need in the future, there are ways you can create a legacy gift now that will also allow you peace of mind in the future. These gifts are often referred to as the easiest ways to give because they:

- **Are available for all ages** – people of any age can include Rocky Mountain Conservancy as a beneficiary of a will, trust, retirement account, life insurance policy, or other financial account.
- **Maintain flexibility** – you can change your mind at any time.
- **Requires no funds now** – you can continue to enjoy use of your funds now, as your donation transfers to the Rocky Mountain Conservancy only after your passing.
- **Take care of loved ones and the park** – decide which gifts to give to your family and loved ones first, then leave a percentage or the residuum of your estate to Rocky Mountain Conservancy.
- **We welcome all amounts** – there is no minimum amount to give a planned gift, a gift of any size will provide crucial funds to help Rocky Mountain Conservancy support Rocky Mountain National Park.

Below are common ways to make a gift through your estate plans. We encourage you to talk with your loved ones, advisors, and the charitable organizations you wish to support to ensure you are utilizing the types of gifts that will achieve both your financial and philanthropic goals.

A Gift Through Your Will
A gift through your will or trust is a way of ensuring that your support of Rocky Mountain Conservancy continues for future generations.

Retirement Plan and IRA Beneficiary Designations
Gifts from retirement funds and IRAs that are paid to anyone other than your spouse on your passing may be subject to heavy income and estate taxes. However, these gifts are tax-free to charity and take only a few minutes to set up. Contact your administrator and ask for a "change of beneficiary form."

IRA - Charitable Rollovers
Individuals age 70 ½ and older can make distributions from $1 up to $100,000 a year to organizations like Rocky Mountain Conservancy directly through their IRA at any time. Qualified gifts are tax-free and can count toward your required minimum distribution, resulting in a distinct tax advantage. Contact the custodian of your IRA for a list of the necessary steps.

Life Insurance
You can make Rocky Mountain Conservancy a beneficiary of a percentage, or all, of your policy simply by updating a form.

Gift from Donor Advised Funds
Consider naming Rocky Mountain Conservancy as a beneficiary/successor to your account. Or you can designate that we receive a portion of the account, keeping the remainder in your fund for your children or grandchildren to continue your legacy of philanthropy through distributions after your lifetime. You can also consider requesting your Donor Advised Fund provider to make grants to us during your lifetime, so that you and your family can see the benefits of your philanthropy.

Gifts from Certificates of Deposit and Other Bank Accounts
You can name Rocky Mountain Conservancy as the "pay on death" beneficiary of a certificate of deposit, or any bank or brokerage account. Your financial institution can assist you with this easy process.

What Can Your Planned Gift Do?

Funds received from planned gifts to Rocky Mountain Conservancy go directly to support Rocky Mountain National Park, and help your legacy of supporting the park continue past your lifetime. Your gift to the Conservancy will benefit the park, being used where the need is greatest at the time it is received, or you can designate your gift for a specific program or project. Please work with us to ensure your wishes are clearly documented, in a way that we can guarantee the Conservancy will be able to fulfill your wishes, no matter what the future may hold.

Your gift, no matter what the size, will help us ensure that Rocky is preserved and protected for years to come, so that future generations will be able to explore and love the park as you have. Thank you for considering making Rocky Mountain Conservancy part of your legacy.

For all legal purposes, please refer to our organization as:

Rocky Mountain Conservancy
Mailing Address: PO Box 3100, Estes Park, CO 80517
Physical Address: 48 Alpine Circle, Estes Park, CO 80517
Phone: 970-586-0108
Tax ID: 84-0472090

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