



BITTERROOT WATER PARTNERSHIP

Bequest Information Sheet

Thank you for taking the first step in creating a lasting legacy for the Bitterroot Valley with a bequest to the Bitterroot Water Partnership. Below you will find some examples of language you might use in your Estate Plans or Will. The following language, **once approved by your lawyer**, can be used in your will or living trust.

Sample Bequest:

"I wish to give (___% of the residuary estate or ___% of the estate or a sum of \$___) to the Bitterroot Water Partnership, located at 162 S 2nd St Hamilton, MT 59840, EIN 43-2000515, to be used wherever it is most needed."

Five common types of bequests:

General Bequests:

This is a gift of a *specific dollar amount*. For example, you might choose to leave \$20,000 to the Bitterroot Water Partnership.

Residual Bequests:

This is the most common type of bequest, because it ensures that loved ones receive their distribution first. This gives the *remainder of your assets to Bitterroot Water Partnership after all other distributions have been carried out*. It could be the entire remainder of your assets, or a certain percentage of the remainder.

Specific Bequest:

This is the gift of a *specific asset*. For example, you might donate land, a car, or art.

Percentage Bequest:

A percentage bequest specifies a particular *percentage* of your estate. For example, you might choose to give 10% of your total estate to Bitterroot Water Partnership.

Contingent Bequest:

This is a gift that is only given if specific conditions are met, such as the passing of a beneficiary. You could specify that should a primary beneficiary (such as a spouse or dependent) pass before you, the assets should go to Bitterroot Water Partnership.

We are deeply grateful to be considered in your Estate Plans or Will. Please let us know if we can support you during this process. For more information or any questions, please contact heather@bitterrootwater.org.

Our Waters, Our Ways of Life

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