

Make a lasting gift

If you already have, or plan to, include Congaree Land Trust in your estate plans, let us know! We'd like to thank you. By informing us of your decision to leave a legacy with Congaree Land Trust, you give our staff the security and knowledge to make decisions for our financial future.

- ☐ I have already included Congaree Land Trust in my estate plans.
- ☐ I would like more information about how to make a bequest to the Congaree Land Trust.
- ☐ I would like to schedule a time to speak with Stuart White, Executive Director, about Planned Giving options with the Congaree Land Trust.

Name _____

Address _____

Email _____

Telephone _____

Best time to call _____

Again, please consult with your professional advisors before making any plans. Additional questions can be directed to legacy@con gareelt.org. Please mail completed form to **PO Box 5232, Columbia, SC 29250**

Perhaps you choose to live in central South Carolina or spend time here because this land—its winding rivers, pastoral settings and ancient forests—inspires you. You feel this land connects you to family memories, summer trips to the lake, stopping at your favorite farm stand, catching your first fish, or simply enjoying the scenic view on a country road.

If this land tells the story of your past and encompasses your vision for the future, you can make a significant difference in conserving what makes this part of South Carolina so special—its land, water and way of life—through planned giving to Congaree Land Trust.

ABOUT CONGAREE LAND TRUST

The Congaree Land Trust (CLT) is a 501 (c) (3) nonprofit organization committed to conserving the natural and scenic lands in central South Carolina. Since 1992, CLT has conserved over **80,000 ACRES** of priority conservation land across 14 counties in this beautiful part of the state, primarily through a tool called a conservation easement. Conservation easements help protect the natural areas that fuel our state's natural resource-based economy and define our way of life.

Visit con gareelt.org to learn more.



For more information on making a lasting gift, return the attached form to

CONGAREE LAND TRUST

Attn: Planned Giving
PO Box 5232
Columbia, SC 29250

PHONE // 803-988-0000

WEB // con gareelt.org

EMAIL // legacy@con gareelt.org

CONGAREE
LAND  TRUST

WHAT WILL BE YOUR

Legacy?



ABOUT OUR PROGRAM

What is Planned Giving?

The term “planned giving” refers to charitable gifts that require some planning before they are made. Planned gifts allow you to make a significant gift to the Congaree Land Trust (CLT), and may offer you current income or allow you to retain the asset for personal use during your life.

While planned gifts take many forms, they are the result of careful planning and an intention to make a lasting gift. These could include bequests made in a will, naming CLT as a life insurance beneficiary, or using tax-wise giving options such as charitable gift annuities or remainder trusts.

Conservation supporters making planned gifts will have extraordinary impact on our work. Proceeds from planned gifts ensure our long-term success and stability, while enriching the legacy of our natural heritage for generations to come.

AVAILABLE OPTIONS

What Can I Give?

Most donors who pledge to support CLT will make gifts of cash (checks and credit card charges) or marketable securities, but other options include gifts of land, life insurance proceeds or ownership, or retirement plan proceeds. *The Congaree Land Trust, Inc. is a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code. EIN# 57-0937485. Gifts are tax deductible as allowed by law, but only your own financial, legal and tax advisors can determine the tax implications of your gift.*



SECURITIES

Gifts of appreciated securities such as stocks (including closely-held S corp. and C corp. stocks) and mutual fund shares can be contributed for charitable purposes. You receive a charitable deduction based on the fair market value of the asset at the date of transfer, and avoid paying capital gains tax on the asset’s appreciation. This can allow you to make a significant gift at a far lower cost to you than donating cash.



LIFE INSURANCE POLICIES

You may make the Congaree Land Trust the owner or the beneficiary of your life insurance policies. A number of options are available that can result in immediate income tax deductions or future estate tax deductions.



RETIREMENT PLANS

The Congaree Land Trust may also be named as the contingent beneficiary of your retirement plan, helping you gain tax savings while giving back. Gifts of these assets can result in significant income and estate tax benefits.



LAND

There are many ways to protect the conservation value of your property through land donations, selling your land at a bargain rate, or working with the Congaree Land Trust to establish a conservation easement. Many of the options result in tax benefits for you and will ensure the land you have come to love and value will be conserved for generations to come.



REAL ESTATE

A gift of real estate that has appreciated in value can be an attractive option when considering a major charitable contribution. You incur no capital gains tax on appreciated real estate given for charitable purposes, and you benefit from a charitable deduction on your income taxes. You can also donate a remainder interest in your home to the Congaree Land Trust, retaining the right to live in it for the rest of your life. This provides you with a current charitable deduction on your income taxes, and causes the property to pass automatically upon your death to the Congaree Land Trust. Whether we decide to permanently conserve the property or sell it, your gift will directly allow the land trust to invest in central South Carolina’s most vital resources—land, water, air, and wildlife.

“MY GRANDFATHER
TOLD ME THAT YOU
NEVER OWN LAND,
YOU JUST LIVE ON IT
FOR A WHILE.
HOPEFULLY A LONG WHILE,
AND YOUR RESPONSIBILITY
IS TO PASS IT ALONG
TO SOMEONE ELSE,
AND PASS IT ALONG
BETTER THAN WHEN
YOU LIVED ON IT.

THIS LAND WILL ALWAYS
BE A FARM, OR A FOREST,
AND THAT MAKES US
VERY PLEASED.

HANK STALLWORTH
Protected Property Owner

