



Next Steps

for Creating Your Legacy with Florence Crittenton

- 1** Contact our **Donor Relations Department** at **406-442-6950** or email **inquires@florencecrittenton.org**.
- 2** If you name Florence Crittenton in your will or as a beneficiary (see our website for sample language), please **use our legal name and federal tax ID numbers**:

Florence Crittenton Home and Services
3404 Cooney Drive
Helena, MT 59602

 Federal Tax ID # for Florence Crittenton Home and Services: **81-0231788**

 Federal Tax ID # for Endowment gifts to our Foundation: **81-0446971**

To qualify for the Montana Endowment Tax Credit, gifts must be made to the Florence Crittenton Foundation Endowment, or to a qualified community foundation. Florence Crittenton has Endowments with the Montana Community Foundation and the Whitefish Community Foundation.
- 3** **Share your legacy with us and others!** If you're comfortable, please share the great news that you have included Florence Crittenton in your estate planning so we may properly acknowledge your commitment to young families and the future.

A Vision for the Future

For more than 125 years, Florence Crittenton has worked with young families. While our mission has remained much the same, the implementation of services has changed over time to meet the needs of families and of our communities. Once a "home for unwed mothers" who were generally sent away in secrecy and shame to have their babies, today we focus on providing critical services for young mothers and their children, while also meeting the needs of all parents and families with young children, giving families the opportunity to heal, grow, and thrive together.

A Legacy of Lives Changed: The Story John Empson

In 1926, John H. Empson made a gift through his will, requesting that 5% of his estate be donated to Florence Crittenton. He chose to set this gift up through a trust; subsequently Florence Crittenton has received a monthly income for nearly 100 years and will continue to receive income in perpetuity. We estimate this one gift has generated nearly \$1,000,000! Your legacy gift allows you to walk in the footsteps of Mr. Empson a century ago and, like this transformational gift, will sustain the work of Florence Crittenton in perpetuity.

WHERE COMPASSION MEETS ACTION

www.florencecrittenton.org
 3404 Cooney Drive • Helena, MT 59602
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 inquiries@florencecrittenton.org



PLANNED GIVING: Be a Catalyst for Change



WE INVITE YOU TO CONSIDER LEAVING A LEGACY THAT WILL TRANSFORM LIVES FOR GENERATIONS TO COME.



Heirs First, Charity Second

Loved ones are understandably the first priority in estate planning. Yet frequently, charitable giving through your will or estate lessens the tax burden on your heirs while establishing your legacy. Generally, it's advantageous to donate the assets that are subject to the highest taxes. If you use retirement assets to start your endowed charitable giving, not only is the full value of your gift transferred to your fund or charity tax free, your heirs will benefit from an estate tax charitable deduction.



What will your legacy be? Do you want to make a statement about your beliefs in family and your community? As you begin planning for the future, building a legacy within the Florence Crittenton family is a perfect opportunity to ensure this world is a better place for your community, your family, and our collective future.

Making Lasting Change Is Not Complicated

Creating a legacy for the future can be easy, and will benefit you, your family, and Florence Crittenton families. Consider these options to ensure you care for your family and community in the most beneficial way:

Earmark a set dollar amount, or specify a percentage of your estate, in your will or trust – in any range you feel comfortable – to Florence Crittenton or the Florence Crittenton Endowment.

Leave a residuary gift to Florence Crittenton, or the Endowment. The residuary is what remains of your estate after other distributions have been made.

If you are looking to take advantage of Montana's incredible charitable tax credits, consider making a planned gift, such as a Deferred Gift Annuity. These gifts can earn you income!