

## Deschutes Land Trust

210 NW IRVING AVENUE, SUITE 102  
BEND, OREGON 97703  
OFFICE: (541) 330-0017  
DESCHUTESLANDTRUST.ORG



CONSERVATION. COMMUNITY. CARING FOR THE LAND.

Deschutes Land Trust

*Planned Giving*

Frequently Asked Questions (FAQs)

---

You can make a planned gift during your lifetime, or through your will and estate plan. Planned gifts can be good options for almost anyone. Advance planning offers you an opportunity to support the Land Trust knowing your gift will further the organization's mission for years to come.

- **“What are the benefits of giving while I’m alive?”**
  - Giving during your lifetime allows you to see the benefits of your gift.
  - Giving during your lifetime allows you to personally be involved with the Land Trust, ensuring your gift is used as you see fit.
  - Giving during your lifetime allows for income tax deductions in the year the gift is given.
  
- **“What are the benefits of giving after my death?”**
  - Giving through your estate after your death provides clarity for surviving family members about your charitable intent.
  - Giving through your estate after your death supports the long-term sustainability of the Land Trust.
  - Giving through your estate after your death may reduce estate taxes.
  
- **“What is a life income gift?”**
  - A life income gift allows you to gift assets – including cash, securities or real estate – in exchange for a stream of income, with the remainder of the funds supporting the Land Trust.
  - Examples of life income gifts are charitable gift annuities, pooled income funds and charitable remainder trusts.
  
- **“What are the basic advantages of a charitable remainder trust (CRT)?”**
  - Diversification of your assets without incurring capital gains taxes
  - Lifetime income
  - Immediate income tax benefits
  - Reduction of estate tax
  - Meaningful support of the Land Trust

## Deschutes Land Trust

210 NW IRVING AVENUE, SUITE 102  
BEND, OREGON 97703  
OFFICE: (541) 330-0017  
DESCHUTESLANDTRUST.ORG



CONSERVATION. COMMUNITY. CARING FOR THE LAND.

- **“How do I add the Land Trust to my existing will or living trust?”**
  - Working with your estate planning attorney or financial advisor, you can simply add an amendment, called a codicil, to your will or living trust.
  - Your bequest intentions are completely under your control during your lifetime.
- **“What if I’ve already named the Land Trust as a beneficiary in my will?”**
  - Please contact Rika Ayotte at the Land Trust to ensure our records reflect your intentions: [rika@deschuteslandtrust.org](mailto:rika@deschuteslandtrust.org) or (541) 330-0017.

*Note: The Deschutes Land Trust can provide information about how your planned gift can support the organization, but cannot provide legal or tax advice. We encourage all supporters to seek independent financial planning and/or estate planning assistance.*

