



Greenbelt Land Trust

# *leaving a legacy*

*Greenbelt Land Trust acts to conserve and protect in perpetuity native habitats, working lands, and lands of natural beauty, which provide a connection to the natural world for residents of the mid-Willamette Valley.*

# Greenbelt Land Trust

## Background.

Greenbelt is: Families. Wildlife. Rural. Trails. Rivers.

In 1989, 12 people came together to talk about the future. These professors, foresters, and teachers were concerned that the beauty and livability of the Willamette Valley would be lost for their children and grandchildren. 27 years ago Greenbelt Land Trust (GLT) formed as a proactive solution to the challenge of diminishing open spaces, healthy streams and wildlife, scenic vistas and recreational trails. The philosophy of an 'emerald necklace' of protected gems throughout the mid-Willamette Valley was soon embraced by the entire community.

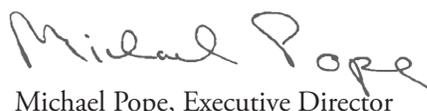
Through the support and membership of nearly 1,000 families, GLT has permanently protected 3,000 acres of the most critical lands in our community. GLT works in our watersheds, prairies, and viewsheds to preserve the Valley emeralds that we all cherish. We have protected historic side-channels of the Willamette River, family ranchland, trail systems, endangered habitats, and wildlife corridors. By protecting these lands, our story is woven together with the fisherman who wants to see Spring Chinook run the River once again, the farmer who has been working quietly for years to improve habitat for migratory birds, or the hiking enthusiast who has overseen the improvement and maintenance of area trails.

*"In the beauty of the land lies the dream of the future."*

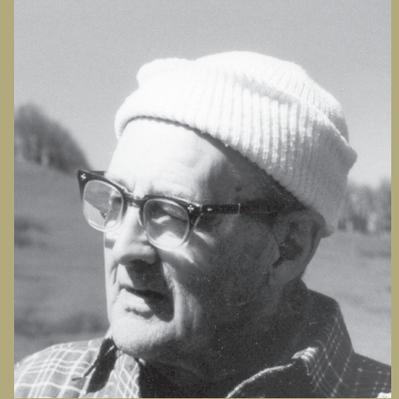
- Charles Ross

As our footprint on the land increases, GLT realizes that we must also be cultivating tomorrow's stewards of the earth. In collaboration with local schools, non-profits, and Universities, we provide opportunities for students to experience planting an Oregon white oak, monitoring the growth of native camas, or constructing nesting boxes for endangered wildlife. Over 500 students visit Greenbelt properties annually, building the next generation of conservationists.

Whether working with youth and mid-Valley residents to create opportunities for accessing natural areas, collaborating with landowners to find creative solutions for their conservation needs, or joining forces with partners across the state to identify shared ecological goals, Greenbelt Land Trust is about working together to make a better future. In 27 years the organization has grown and expanded, and yet the same values that spurred a dozen people to begin a conversation about conservation in 1989 persist today.

  
Michael Pope, Executive Director

## A Greenbelt Vision



Charles Ross

"Our family loves this city, and its incomparable green setting. The undeveloped country that still remains around it is the Glory of Corvallis: the handsome hills and gentle meadows, the old oaks, the tangled wetlands near rivers and streams, the alternately smooth and rolling fields.

We do not have other natural features to lend memorable interest to our place—such as bold mountains and wide bodies of water.

We see these landscapes around the city—its one saving jewel—going under an ever-advancing shadow of urban and suburban spread. We have only a few years to set aside permanently the open space that will retain a measure of our heritage from a bountiful Creator."

From "A Fragment of a Dream", a speech delivered at the dedication of Chip Ross Park, 9/22/79.

# Leaving a Legacy

## Why Consider Greenbelt Land Trust in your Estate Planning?

When you name Greenbelt Land Trust in your will, you are making a gift to protect land in your community in perpetuity. Your gift will be used to assist GLT in our mission of protecting open space, critical habitat, and natural areas. Conservation of these lands helps to preserve the diversity and beauty of the unique landscape in the mid-Willamette Valley. Your estate plan offers you an opportunity to ensure that the things you believe in and worked towards in your lifetime will be realized—even after you are gone.

## What is a Planned Gift?

Planned gifts refer to gifts for which you must plan, taking into account financial, family, business, and/or estate considerations along with personal philanthropic goals. These gifts may take many forms. The most common form is a charitable bequest. Planned gifts are popular because they can make possible a significant charitable contribution, save taxes for your heirs, and help to leave a meaningful legacy. Whether you use cash or other assets, the benefits of a planned gift can make charitable giving attractive to you and the Greenbelt Land Trust.

## Planned Giving Options:

- Simple bequest
- Particular asset or group of assets
- Retirement Account Beneficiary
- Charitable Remainder Trust
- Gift Annuities
- Percentage of Estate



## What are the Benefits of Making a Bequest?

- A bequest costs you nothing now, and yet it offers a way for you to support the preservation and stewardship of natural areas you are interested in
- A bequest provides a way for you to make a lasting impact to GLT. Many bequests continue to provide valuable support to programs, properties, and staff long after the bequest is received
- Bequests to GLT are not subject to federal estate taxes, meaning that the organization is able to use the full amount of the gift for the purposes you specify
- If you notify GLT of your bequest to the organization, you will be included as a member of our Legacy Society, which GLT established to honor the supporters who have included GLT in their estate plans. Members are invited to participate in special events throughout the year.

# Making a Bequest

## How to Make a Bequest

Making a bequest to GLT is easy. You may sign a new will or trust instrument, add a codicil to your present will, name GLT as a beneficiary of your plans, or amend your present trust instrument. To ensure that your exact intentions are implemented, estate planning documents should be prepared in consultation with your attorney and, with respect to provisions for Greenbelt, discussed with our Associate Director.

You may fund a bequest with a specific dollar amount or a specific asset such as real estate or securities. Alternatively, you could specify that Greenbelt Land Trust receive a percentage of your estate, or the residue of your estate.

## Sample Bequest Language

*I give, devise, and bequeath to the Greenbelt Land Trust, a nonprofit charitable organization with office in Corvallis, Oregon, the sum of \$\_\_\_\_\_ (or describe any real or personal property), to be used for its general purposes.*

*I give, devise, and bequeath to the Greenbelt Land Trust a nonprofit charitable organization with office in Corvallis, Oregon, all (or \_\_\_\_%) of the rest, residue, and remainder of my estate, to be used for its general purposes.*

*If any of the above-named beneficiaries should predecease me, I hereby bequeath his or her share to the Greenbelt Land Trust, a nonprofit charitable organization with office in Corvallis, Oregon, to be used for its general purposes.*

## Examples of Bequests

There are several methods you can choose from to provide a bequest to Greenbelt. The following are a few examples.

- The donor's will provides for a specific bequest amount to the Greenbelt Land Trust
- The donor's will provides for a living trust for a bequest of the residue of the donor's estate
- A donor names Greenbelt as the beneficiary of an IRA as an unrestricted gift
- Donors name GLT as the beneficiary of their joint life insurance policy

In all cases, the donor's estate will be entitled to an estate tax deduction for the full amount of the gift.



**Rudi and Christel Engelbrecht**

## *a legacy for the land*

Rudi and Christel Engelbrecht were two of Greenbelt Land Trust's most ardent supporters, being advocates of open spaces and the preservation of scenic vistas throughout the Willamette Valley. Rudi and Christel's dedication to protecting special lands around Corvallis is evidenced in their long-term involvement with our community and with GLT, and in the generous gifts that have been bestowed upon our organization at their passing.

In 2009, Greenbelt was one of the beneficiaries listed in Rudi's will and two life insurance policies, and was named a beneficiary of Christel's estate. The funds from these generous bequests have enabled Greenbelt Land Trust to develop a legacy fund to support the work of conservation in the Willamette Valley.

In recognition and honor of the Engelbrecht's generosity, Greenbelt has installed a memorial bench in their honor at Bald Hill Natural Area, overlooking the hills and prairies that drew this couple to Oregon from Switzerland over 50 years ago.

The Engelbrecht's are two of the latest Greenbelt members that have left a legacy for all to enjoy and further the conservation work that we have promoted for over two decades.

# Additional Options

## Deferred Giving

These options include Charitable Remainder Trusts, Charitable Remainder Lead Trust, and Gift Annuities. When you make a life income gift, you (or your designated beneficiaries) will receive a regular income from the gifted property for life. You will also receive significant tax savings, along with the opportunity to support the goals and achievements of Greenbelt Land Trust for generations to come.

### Is Making A Deferred Gift For You?

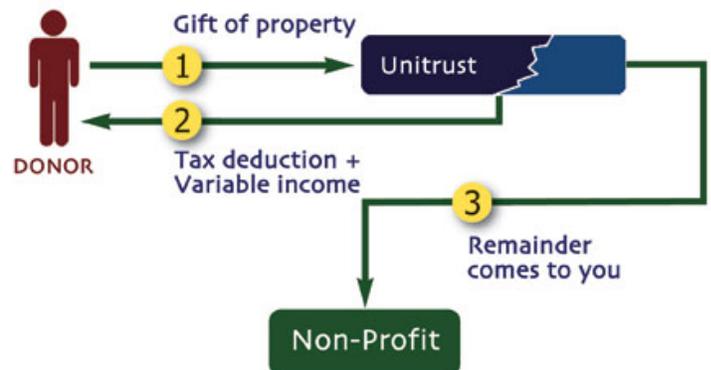
- Are you in a position, both practically and financially, to irrevocably transfer cash, securities, or real property to GLT based on a life income gift arrangement?
- Would you like to receive a regular income for life or to provide for someone else, such as a member of your family?
- Are you interested in a considerable income tax deduction as well as potential savings on capital gains tax that you might otherwise incur?
- Do you like the idea of making a gift that will provide benefits to you or your loved ones for life and that you know will benefit GLT in the future?

*If your answer to any of these questions is "yes," a charitable remainder trust or other type of life income gift may be a good option for you.*

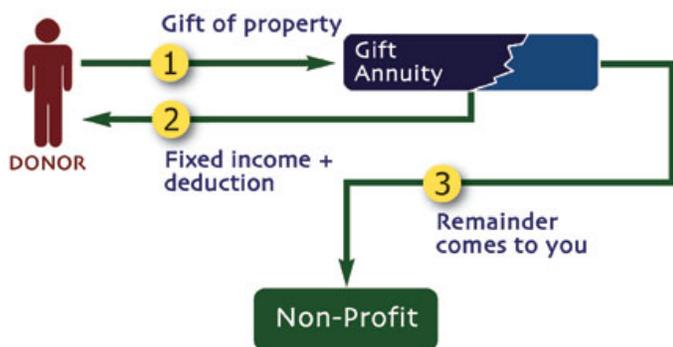
#### Simple Bequest



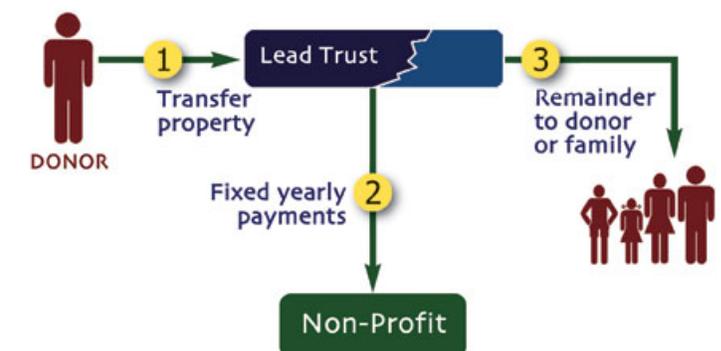
#### Charitable Remainder Unitrust



#### Charitable Gift Annuity



#### Charitable Lead Trust



If you are interested in the deferred giving options discussed above, they can be arranged in partnership with qualified organizations like the Oregon Community Foundation, or financial institutions listed.

Please contact our office for more information.

# Resources

## Estate Planning Attorneys

- Marek and Associates  
www.ronlaw.com - 810 SW Madison Ave. - (541) 754.1411
- Barnhisel, Willis, Barlow, and Stephens  
www.bwbslaw.com - 123 NW 7th St. - (541) 757.0575
- Jeanne Smith and Associates  
www.smithlaworegon.com - 104 SW 2nd St. - (541) 752.6416
- Evashevski, Elliott, Cihak & Hediger, P.C.  
www.eechlaw.com - 745 NW Van Buren Ave. - (541) 368.7558

## Oregon Community Foundation

www.oregoncf.org - 440 E. Broadway, Ste. 160 Eugene, OR - (541) 431.7099

## Benton County Foundation

www.bentoncountyfoundation.org - 343 NW 7th St Corvallis, OR 97330 - (541) 753-1603

## Contact Greenbelt about Planned Giving:

Greenbelt Land Trust's knowledgeable staff is ready to assist you in making the best philanthropic decisions for your financial needs. We enjoy making sure that donors understand their options, and make smart use of their assets for themselves and for Greenbelt. Please contact us for more information:

### Greenbelt Land Trust

(Mailing): PO Box 1721, Corvallis, OR 97339

(Office): 101 SW Western Blvd., Ste. 111 - Corvallis, OR 97333 - (541) 752.9609

Associate Director - Jessica McDonald - jessica@greenbeltlandtrust.org

www.greenbeltlandtrust.org

Tax ID #: 94-3113836

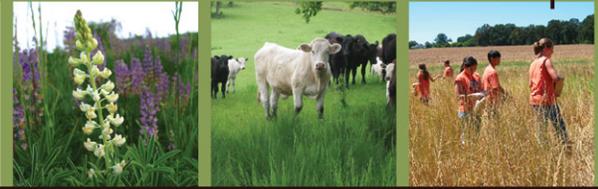
*This information is intended as educational in nature and not intended as tax or legal advice. It is important that you work closely with your tax and legal advisors as you create a personal estate plan.*



# Greenbelt Land Trust Conservation Map

Protect. Restore. Enjoy.

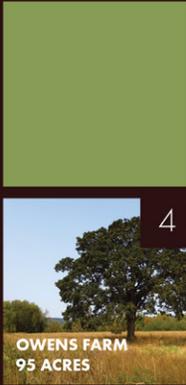
Alongside willing landowners, Greenbelt Land Trust conserves and stewards the most important lands in the mid-Willamette Valley today, before they are gone tomorrow.



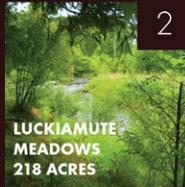
**WILLAMETTE BLUFFS**  
120 ACRES



**FITTON GREEN NATURAL AREA**  
143 ACRES



**OWENS FARM**  
95 ACRES



**LUCKIAMUTE MEADOWS**  
218 ACRES



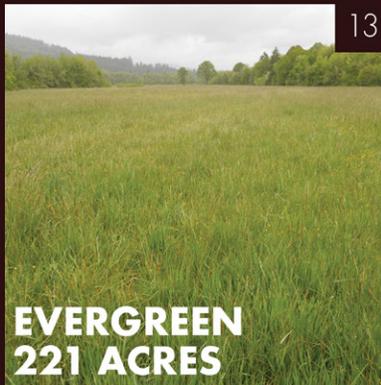
**BALD HILL FARM**  
587 ACRES



**LONE STAR RANCH**  
199 ACRES



**LUPINE MEADOWS**  
58 ACRES



**EVERGREEN**  
221 ACRES



**LITTLE WILLAMETTE**  
199 ACRES



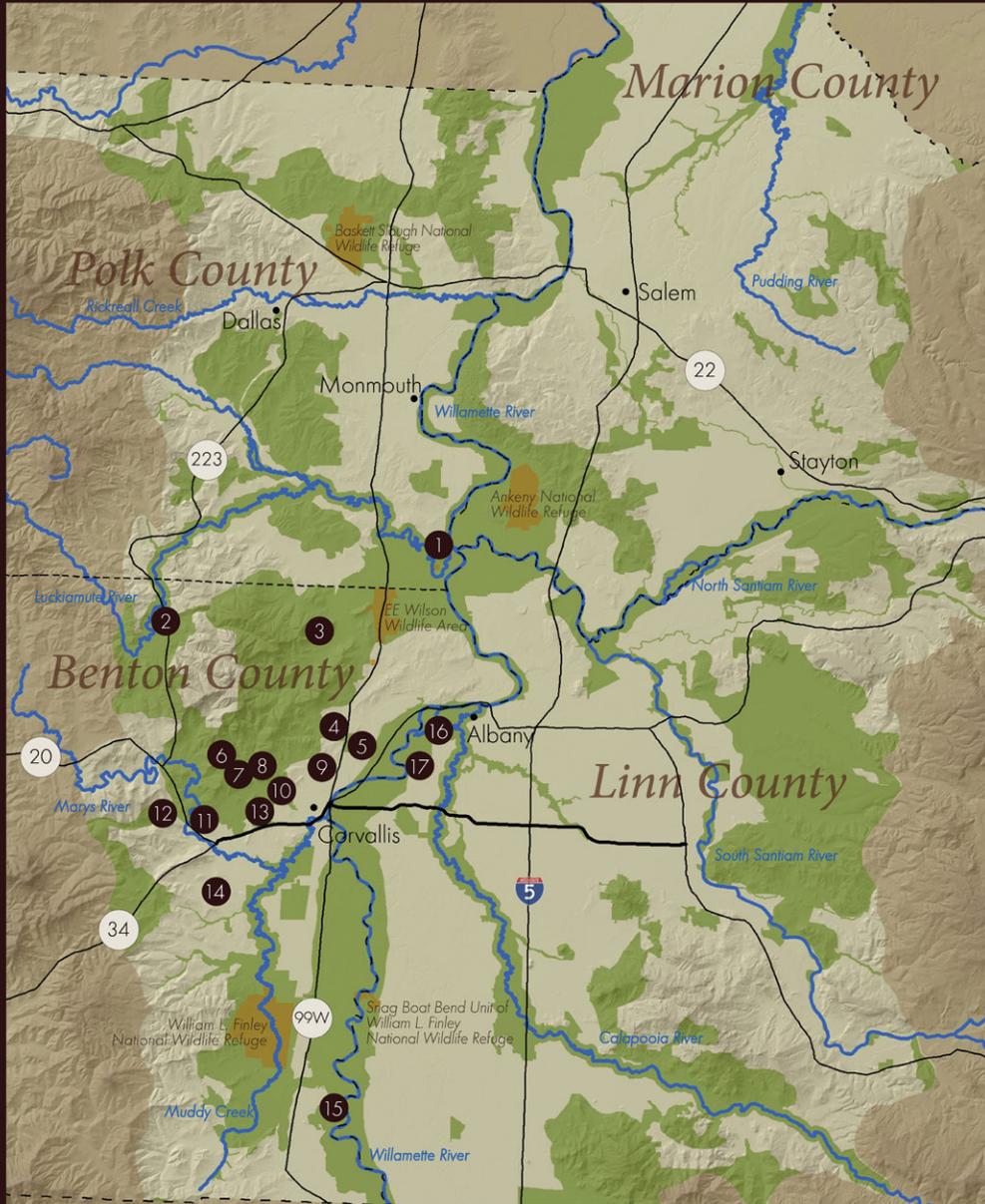
**HARKENS LAKE**  
425 ACRES

GLT PROTECTED AREA

STATE/FEDERAL PROTECTED AREA

WILLAMETTE VALLEY ECOREGION

CONSERVATION OPPORTUNITY AREA



## Protected Lands

### POLK COUNTY

- 1 Willamette Bluffs - 120 acres

### BENTON COUNTY

- 2 Luckiamute Meadows - 218 acres
- 3 Soap Creek - 9 acres
- 4 Owens Farm - 95 acres
- 5 Jackson Frazier Wetlands - 149 acres
- 6 Fitton Green Natural Area - 143 acres
- 7 Mulkey Ridge Forest - 170 acres
- 8 Bald Hill Farm - 587 acres
- 9 Forest Dell - 6 acres
- 10 Bald Hill Natural Area - 41 acres
- 11 Lone Star Ranch - 199 acres

- 12 Newton Creek - 7 acres
- 13 Lupine Meadows - 58 acres
- 14 Evergreen - 221 acres
- 15 Harkens Lake - 389 acres

### LINN COUNTY

- 16 Little Willamette - 199 acres
- 17 Horseshoe Lake - 236 acres





PO Box 1721 - Corvallis, OR 97339 - (541) 752.9609