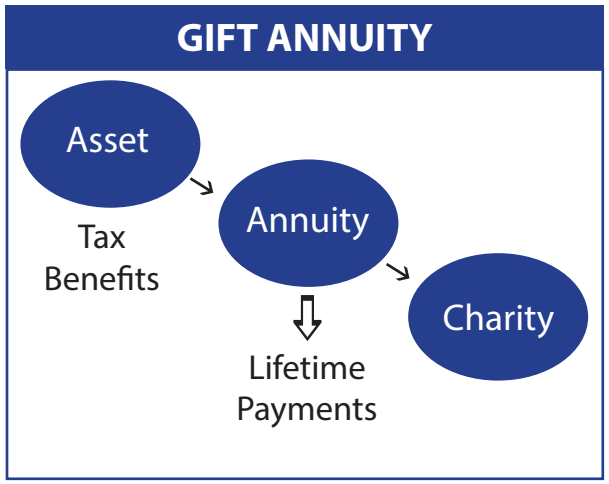
Benefits of a Gift Annuity...

Once established, income payments are made for life. Annuity rates (the rate for income payments made to you) are based on age and are higher for more senior persons.

With the benefits of fixed income payments, reduced taxes, and an ultimate gift to charity, it's easy to see why so many consider the gift annuity to be the ultimate win-win solution in today's economic environment!



The Central Montana Foundation Board of Directors is committed to prudently managing its financial resources & making strategic investments for the prosperity of our Central Montana communities.

Who We Are...

Central Montana Foundation is a 501(c)(3) nonprofit charitable organization founded in 1984. It is a means for those who love Central Montana to give back to the community of which they have been a part and realize significant tax benefits by doing so.

Endowments and pass-through funds provide support exclusively to projects within the Central Montana area. The Foundation is managed by a Board of Directors who supervise the disposition of donations:

President: Dean Comes
First Vice President: Sandra Westhoff
Second Vice President: Josh Webber
Secretary/Treasurer: Robyn Bakkedahl
Board Members: Alan Aldrich, Brandon Bantz, Bret Carpenter, Sonny Comes, Brian Henderson, Diane Oldenburg, Thom Peck, Carl Seilstad & Jennifer Weeden
Executive Director: Carrie Mantooth
Financial Manager: Allied Investment Adivsors
Accountant: Mickey McMillan

See a complete list of permanent endowments held with Central Montana Foundation on our website under the EZ GIFT tab at:
www.centralmontanafoundation.com

For more information, contact:
Central Montana Foundation
406.538.6130
cmtfoundation@midrivers.com
PO Box 334 • 224 W. Main St., Suite 202
Lewistown, MT 59457

Leave Central Montana a better place through...

PLANNED GIVING

The true meaning of life is to plant trees under whose shade you do not expect to sit.
~ Nelson Henderson

CENTRAL MONTANA FOUNDATION
Helping Improve Central Montana
Since 1984

What is Planned Giving?

Planned Giving is a way you, a donor, can leave money and/or assets to a non-profit at your death, or, better yet, a way to invest money so that you receive benefits during your life and then bequeath the remaining funds to a qualified non-profit, like Central Montana Foundation.

Planned giving provides you with a way to make a lasting gift to a qualified charity like Central Montana Foundation, while at the same time, receiving favorable tax consideration.

A planned gift will allow you to maintain access to income during your lifetime if you so desire, provide estate and tax planning tools, and help Central Montana Foundation build permanent wealth to achieve its mission of improving life in Central Montana.

Planned gifts may produce significant tax savings, as they often help the donor avoid or stretch out payment of capital gains tax, earn federal and state income tax deductions, reduce the size of the donor's estate, and, if given to a qualified Montana endowment, be eligible for the Montana Endowment Tax Credit.

You may qualify for a federal tax deduction, a Montana income tax credit, and not have to recognize the capital gain on gifts of appreciated property by making a planned gift to Central Montana Foundation!

More about the Montana Endowment Tax Credit...

The Montana Endowment Tax Credit allows donors to pay less in Montana state income taxes when they give an irrevocable planned gift to a qualified Montana charitable endowment. A Montana tax credit is available for 40 percent of the present value of any planned gift to a permanent endowment, up to a maximum of $10,000 per taxpayer (individual or business). A Montana credit of 20 percent is available for a cash gift given by a business entity to a permanent endowment. And, with a gift of appreciated property, there is no recognition of capital gain for federal or Montana income tax purposes. Call Central Montana Foundation at 538-6130 to learn more!

Planned Giving Methods

Central Montana Foundation works with donors on planned giving opportunities. These methods can provide donors with a fixed income for life AND leave a lasting gift to Central Montana Foundation:

CHARITABLE GIFT ANNUITY

A donor transfers a gift of cash or property to Central Montana Foundation now, gets immediate tax benefits, and ensures that they or a loved one receive quarterly or annual income for life.

DEFERRED CHARITABLE GIFT ANNUITY

Similar to a Charitable Gift Annuity except the payments to the annuitant(s) are deferred to the maximum age allowed by the IRS, which creates greater tax savings.

Contact Central Montana Foundation for an illustration on how setting up a planned gift for an endowment could help you save on taxes and earn an income tax credit in Montana!

Contact your financial advisor for more information about planned giving or contact Central Montana Foundation at 538-6130 to get started today!