

The mission of the Westerly Land Trust is to conserve and preserve Westerly's open spaces and special places and to enhance community resources. Specific programs include the preservation of open space, rehabilitation and revitalization of our historic downtown and establishment of education and recreation opportunities for the public. The Trust's programs and activities are directed to the protection and enhancement of the environment and water resources as well as the community's "sense of place". Westerly is recognized as a place with special charm and attractions which are a source of pride to its residents and a magnet for tourists. The Trust aims to protect and strengthen that reputation.

### Bequests Through a Will or Trust

The most popular and simplest way to make a planned gift is under your Will or Trust. You can provide a specific dollar amount, a percentage, a residual amount, real estate, or tangible property to WLT. This provision can be made through a new Will or Trust or added as a codicil or amendment. (See WLT website for sample language to add a codicil to your Will.)

### Gifts of Life Insurance

Several options are available for making a charitable gift of insurance policies. With a relatively small outlay, you can make a substantial gift while obtaining tax benefits. WLT can be named as the sole, partial, or contingent beneficiary of a new or existing policy. Also, a paid up policy can be donated to WLT as the owner and sole beneficiary.

### Charitable Gift Annuity

There are many ways to fund a Gift Annuity, but cash or appreciated stock are the most common. When transferring securities to WLT, you can obtain an immediate charitable income tax deduction and bypass a portion of the capital gains tax as well. In addition, your income can frequently be increased in the form of a lifetime annuity payment based upon your age.

### IRA Rollover and Pension Fund Gifts

Often the largest part of one's estate, these funds are some of the best ways to make a charitable gift because of the ease of initiation, particularly under new legislation. Donating these assets to WLT avoids double taxation under income and estate tax provisions. WLT can be named as a partial or contingent beneficiary of your retirement or pension plan.



# THE GIFT THAT LASTS FOREVER

Preserving the Westerly Land Trust through  
Planned Giving & Estate Planning

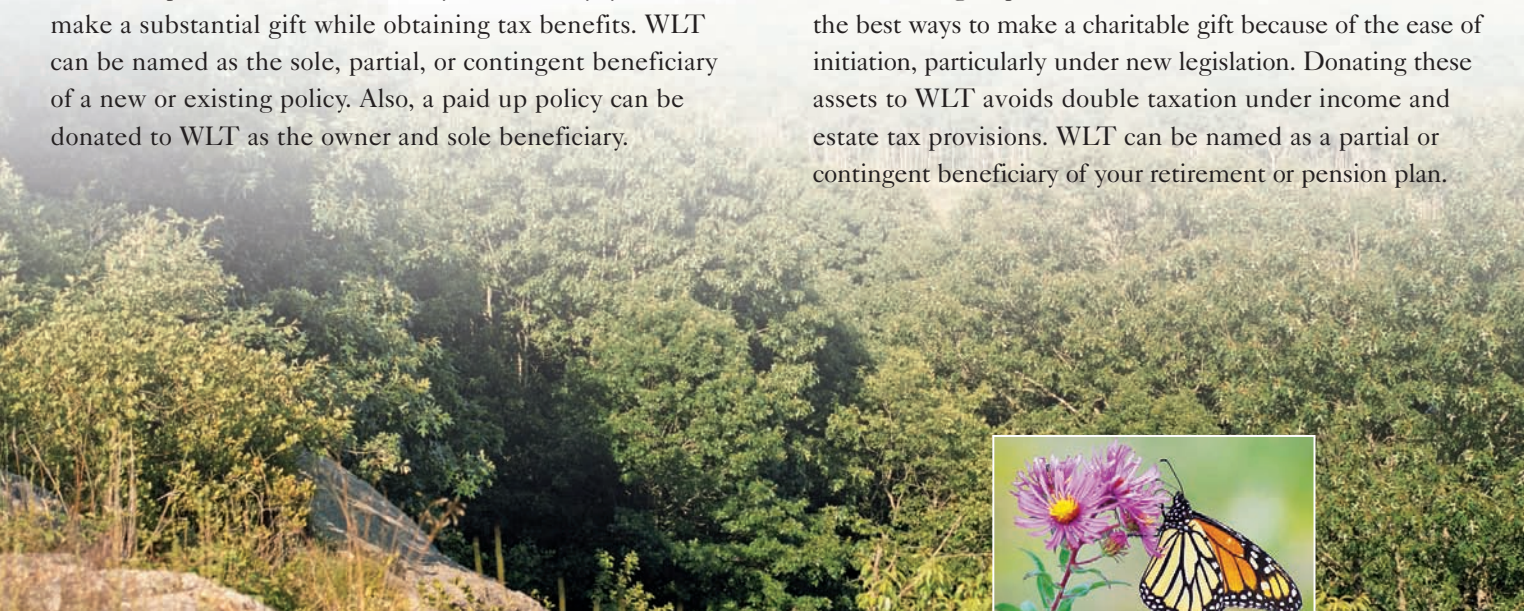
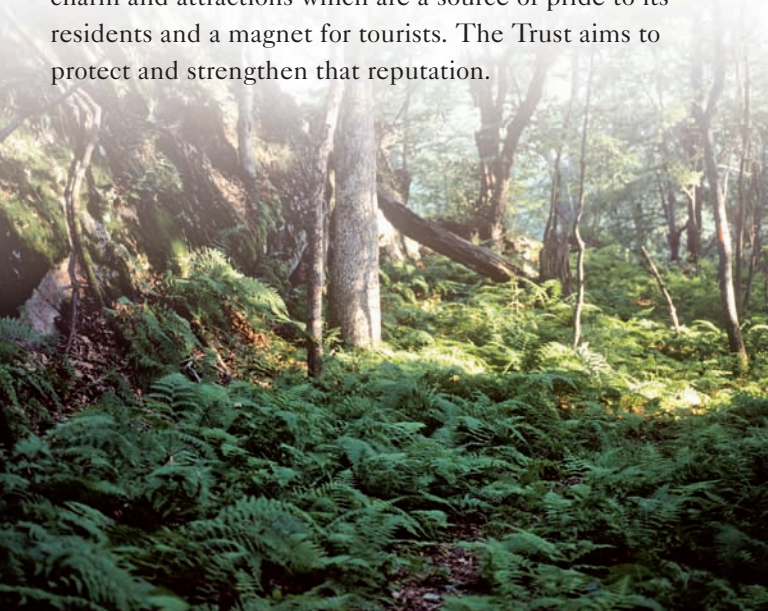


THE WESTERLY LAND TRUST  
PO Box 601 • Westerly, RI 02891  
(401) 315-2610

[www.westerlylandtrust.org](http://www.westerlylandtrust.org)

## THE NEXT STEP

If you'd like assistance planning and directing your gift to the Westerly Land Trust, please contact Kelly Presley at (401) 315-2610, [execdir@westerlylandtrust.org](mailto:execdir@westerlylandtrust.org) or visit our website at [www.westerlylandtrust.org](http://www.westerlylandtrust.org).



## CREATE A LEGACY

By including the Westerly Land Trust in your estate planning, you are protecting the natural beauty and environmental health of Westerly for future generations. Along with your financial gift, you are giving . . .

- The gift of open lands where all can learn about and enjoy the wonders of nature
- The gift of clean water and air
- The gift of solace and respite in a busy world
- The gift of inspiration and reflection for all appreciators of natural beauty



## THE ORCHARD SOCIETY

If you are planning to include, or have already included, the Westerly Land Trust in your estate planning, please let us know. We would like to thank you for your generosity and welcome you to the *Orchard Society*. The Orchard Society is a group of forward thinking individuals who have demonstrated their love of and concern for the future of Westerly's sense of place by supporting the Westerly Land Trust through their planned gifts.

For those who donate a gift of \$10,000 or more, we will plant a RI native tree in your honor with a plaque beside it, designating your name.

The information in this brochure is not intended as legal advice. Please consult with your attorney or tax advisor when making your giving arrangements. All examples used within are for illustrative purposes only and are based on IRS regulations in effect at the time of printing.

### *Thank you!*

In whatever manner you choose to give, and in whatever amount, we are grateful for your investment in the Westerly Land Trust's future. Your planning today helps ensure the natural beauty and ecological integrity of Westerly tomorrow. Future generations will benefit from your foresight. *You will truly have given a gift that lasts forever.*



*"By supporting the Westerly Land Trust, we can help preserve what made Westerly such an ideal setting in which to raise a family - fields, woods and access to water - and we're sure that our children will be pleased with how we decided to spend part of their inheritance."*

*Franklin & Donna Celico*

*"As a descendant of the founders of Westerly and an Avondale boy at heart, I'd like to ensure the continuation of the Westerly Land Trust's activities and the preservation of Westerly's open spaces for future generations. Therefore, I have designated the Westerly Land Trust as a beneficiary in my estate plans. But hopefully, it will be a good long time before they get it since I plan to be here for awhile."*

*David Rathbun*

*"We were involved in saving the first preserve, Avondale Farm Preserve. We have taken great delight in the land trust's growth since then. We recognize that lands saved "in perpetuity" require similar funding and are honored to be a part of making that possible."*

*William & Kathy McKendree*

*"It is not often that one can do something, and think in terms of "forever". I am leaving a bequest in my Will to the Westerly Land Trust because I want to help make sure that all the special places that have been protected by the Land Trust will be cared for forever."*

*Robert Liguori*