

“Planned Giving”

While bequests constitute 80 to 90 percent of all gifts from estates, there are many other options.

“Planned giving” professionals deal in products such as gift annuities and charitable trusts, some of which offer income during your lifetime with a gift to a designated charity upon your passing.

Those interested in more sophisticated planned gifts should contact their financial advisors.

Upon request, we can put you in touch with the **Greater Kansas City Community Foundation**, which manages OCTA’s endowments and has a full team of professional gift planners.

For more information, contact OCTA headquarters.

Our Vision:

The Oregon-California Trails Association is the pre-eminent guardian and promoter of the inspirational story of the 19th century westward American migration, which is unique in world history.

Our Mission:

Our mission is to protect the Historic Emigrant Trails legacy by promoting research, education, preservation activities and public awareness of the trails, and to work with others to promote these causes.

Leave A Legacy for the Trails



OCTA Trails Legacy Society

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OREGON-CALIFORNIA TRAILS ASSOCIATION

The Trails Legacy Society

One hundred years from now, you can still be helping to preserve the historic trails and the stories of the emigrants who traveled them.

Making that possible is why OCTA has created the **Trails Legacy Society**.

It is a simple way for anyone who loves the trails to help make a lasting difference for the overland trails.

All you need to do is include a bequest to OCTA in your will or other estate plans.

All gifts will go directly to OCTA Endowment funds and you can designate the Endowment you wish to leave your gift to, as well as any conditions, restrictions or special purposes you wish to assign to your gift.

Building OCTA's Endowment funds will help us continue to protect the legacy of the trails.

When the time is right, won't you consider a gift to OCTA in your will? All it takes is a quick call to your lawyer or financial advisor.

That 15-minute call can save a trail.

Each OCTA Trails Legacy Society member will receive:

- A special Trails Legacy Society pin.
- A list of Legacy Society members

(with permission) will be printed annually in the *Overland Journal*.

- The names of the Society members will be displayed (with permission) in an appropriate manner at OCTA headquarters.
- New Society members will be recognized each year during the annual convention.

Most of all, members of the Society will know that they can make a difference in trails preservation that will last beyond their lifetimes.

We've included some sample bequest language that you can consider. Of course, any decision should be made only after consulting with your attorney or financial advisor and only after considering the best interests of you and your family



Sample Bequest Language

The following language can aid you and your attorney or financial advisor in preparing your bequest to the **Oregon-California Trails Association**.

I give, devise and bequeath to the Oregon-California Trails Association, nonprofit corporation organized in accordance with the laws of the State of Colorado, for the purpose of supporting its efforts to preserve overland trails, (a) the sum of \$ _____ ; or (b) the following described property _____ ; or (c) (____ % of) the rest, residue and remainder of my estate.

Outright Bequest

This bequest shall be used to further the purposes of the Oregon-California Trails Association in its trails preservation efforts, without restriction.

Designated Bequest

The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the Oregon-California Trails Association, but the gift shall be designated for use within the terms of the following specific endowment fund:

Heritage Fund
Loomis Preservation Fund
Martin Legal Fund

Bequest To Establish A New Endowment Fund

The gift shall be entered in the Association's books and records as the _____ Endowment Fund, and shall always be so designated. The property comprising this gift may, for investment purposes, be merged with any of the general investment assets of the Oregon-California Trails Association. Distributions from the fund shall be used for the follow purposes:

If you select a specific purpose for your gift, inclusion of the following sentence will ensure that the bequest remains useful if circumstances change in the future:

If, in the judgment of the OCTA Board of Directors, changed circumstances should, at some future time, render the designated use of this fund impracticable, unwise or inappropriate, then the Board shall use the fund to further the objectives and purposes of the Oregon-California Trails Association, giving consideration to my special interest as described above.