

The Threat Is Real

Our irreplaceable historic trails are disappearing at an alarming rate.

Leaving a legacy for future generations can make sure the trails are always there to be appreciated and enjoyed.

Your gift to an OCTA Endowment fund through a bequest or estate gift will guarantee our ability to preserve and protect the trails.

The threats have never been greater.
We need your help.

Join the Trails Legacy Society today.

Legacy Giving

While bequests constitute up to 90 percent of all gifts from estates, there are many other “planned giving” options.

These include gift annuities and charitable trusts, some of which offer income during your lifetime.

Those interested in considering all available options should consult a qualified professional financial advisor.

Our Vision:

The Oregon-California Trails Association will continue to be the pre-eminent guardian and promoter of the inspirational story of America’s 19th century westward migration, which is unique in world history .

Our Mission:

Our mission is to protect the historic emigrant trails legacy by promoting public awareness of the trails through research, education and preservation activities; by achieving organizational sustainability; and by partnering with others



OREGON-CALIFORNIA TRAILS ASSOCIATION

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**Will your grandchildren
follow your footsteps on
the trails?**



***Leave A Legacy
for the Trails***

OCTA Trails Legacy Society

**OREGON-CALIFORNIA
TRAILS ASSOCIATION**

Trails Legacy Society

A century 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 created the Trails Legacy Society.

It is an easy way for anyone who loves the trails to help leave a lasting legacy for the overland trails.

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

All gifts go directly to OCTA Endowment Funds and you can designate the specific fund, as well as any conditions, restrictions or special purposes you wish to assign for your gift.

Building OCTA's Endowment 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 call can save a trail.

Each Trails Legacy Society member will receive:

- A special Trails Legacy Society pin.
- Your name (with your permission) will be included annually in the *Overland Journal*.

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

Most of all, members of the society will know that they have made 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 after considering the best interests of you and your family.

If you choose to name the Oregon-California Trails Association as a beneficiary of your estate, please let us know of your plans. This will enable us to show our appreciation of your generosity.

**For more information, visit
OCTA-trails.org/trails-legacy-society
or call OCTA at (816) 252-2276.**

Sample Bequest Language

The following can help you and your attorney in preparing your bequest to the Oregon-California Trails Association.

I give, devise and bequeath to the Oregon-California Trails Association, an Independence, MO, 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 \$_____ ; b) the following described property _____ ; 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 Permanent 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). The 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.