**Example Appeal Letter – Montana Endowment Tax Credit**

Below is a sample appeal that discusses the LCF+ Incentive Program along with the Montana Endowment Tax Credit (METC). The first is a written appeal with a formal tone, the second is an email appeal with an informal tone.

Please feel free to tailor this letter to fit your community foundation.

[Insert Logo]

[Local Community Foundation]

[Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

Dear [Donor’s Name],

Would you like your support for [local community foundation] to go further? We are reaching out about a tool – the Montana Endowment Tax Credit (METC) – which will help you maximize your impact.

METC is an above-the-line tax credit on your Montana income tax. It offers a 40% tax credit for planned gifts to qualified endowment funds, with annual individual and joint filing limits of $15,000 and $30,000, respectively. For businesses, it offers a 20% tax credit on cash contributions up to $15,000 annually.

The excitement does not end there. In 2024, we are raising $[x] for our endowment. When we achieve this goal, the Montana Community Foundation will add $5,000 to our effort for grants in our [community].

METC is a win-win-win. Your donation to our endowment will support our community for generations to come, reduce your tax liability, and help us secure an extra $5,000 in grants for [community].

Ready to make a lasting difference? Please reach out to [local community foundation] to learn more at [email address] or [phone number].

Sincerely,

[Your Name]

[Your Title]

[Local Community Foundation]

*P.S. What’s your legacy for [community]? We would love to talk with you about including [local community foundation] in your will. If you have included [local community foundation], let us know so we can thank you!*

***Subject: Maximize Your Impact with the Montana Endowment Tax Credit!***

[Salutation],

Would you like your support for [local community foundation] to go further? As you may have heard, we are raising $[x] for our endowment in 2024. When we achieve this goal, the Montana Community Foundation will add a remarkable $5,000 to our efforts for grants in [community].

The excitement doesn’t end there. We’re thrilled to introduce you to a tool that will maximize your impact: the Montana Endowment Tax Credit (METC). METC is an above-the-line tax credit on your Montana income tax. METC offers a 40% tax credit for planned gifts to qualified endowments, with annual individual and joint filing limits of $15,000 and $30,000, respectively. For businesses, METC offers a 20% tax credit on cash contributions up to $15,000 annually.

METC is a win-win-win. Your donation to [local community foundation]’s endowment will support our community for generations to come, reduce your tax liability, and help us secure an extra $5,000 for grants in [community].

Ready to make a lasting difference? Reach out [local community foundation] to learn more at [email address] or [phone number].

*P.S. What’s your legacy for [community]? We would love to talk with you about including [local community foundation] in your will. If you have included [local community foundation], let us know so we can thank you!*