**Example Appeal – Ways to Give**

Below is a sample appeal that discusses the LCF+ Incentive Program along with ways donors can contribute to your endowment. 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],

As you may know, this year [local community foundation] is embarking on a new challenge: raising $[x] for our endowment. If we succeed, the Montana Community Foundation will give us an additional $5,000 for grants in [community].

We know that we will need our community’s collective impact to raise these funds. We also know that giving is personal, so we wanted to share the various ways that you can give to [local community foundation]’s endowment:

1. **Cash.** You can donate via credit card at <https://mtcf.org/giving/give-now> or check at [address].
2. **Bequests.** You can include a gift to [local community foundation] in your will. If you do this, in some cases, you can receive a substantial reduction in federal gift and estate taxes!
3. **Stocks, Bonds, and Mutual Funds.** You can gift appreciates securities, such as stocks, bonds, and mutual funds, and receive a charitable donation for the full fair market value of the donated asset.
4. **Life Insurance.** You can name [local community foundation] as a beneficiary of your policies, or you can simply donate them outright.
5. **Retirement Plan Assets.** You can leave all or part of your retirement plan to [local community foundation], or you could donate using an IRA distribution.
6. **Gifts of Property or Real Estate.** You can donate property, deducting the fair market value and eliminating all capital gains taxes.
7. **Charitable Gift Annuity.** You can donate via a CGA now, get tax benefits, and ensure you or a loved one receives a fixed annual income for life.
8. **Charitable Remainder Trust.** You can place cash or property in a trust that pays income to you each year. At the end of the trust’s term, the remaining assets would transfer to [local community foundation].

If you would like to talk about a way to give that fits your unique situation, please reach out to [local community foundation] at [email address] or [phone number].

Your support, regardless of the amount or method, plays a vital role in building our endowment and securing this extra $5,000 for our community.

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: Your Generosity, Your Choice: Explore Your Ways to Give***

[Salutation],

In 2024, [local community foundation] is raising $[x] for our endowment to receive $5,000 from the Montana Community Foundation for grants in [community].As we embark on this journey, I wanted to share the various ways that you can contribute to our endowment.

1. **Cash.** You can donate via credit card at <https://mtcf.org/giving/give-now> or check at [address].
2. **Bequests.** You can include a gift to [local community foundation] in your will. If you do this, in some cases, you can receive a substantial reduction in federal gift and estate taxes!
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To chat about a way to give that fits your unique situation, reach out to [local community foundation] at [email address] or [phone number].

Your support, regardless of the amount or method, plays a vital role in building our endowment and securing this extra $5,000 for our community. Let’s make 2024 a year of collective impact for [community]!

*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!*