



SANTA FE CONSERVATION TRUST

PLANNED GIVING

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ESTATE PLANNING





# HOW YOU CAN SUPPORT THE SANTA FE CONSERVATION TRUST THROUGH A PLANNED GIFT

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As you contemplate your estate plan, please help the Santa Fe Conservation Trust (SFCT) preserve open spaces and trails through a planned gift. SFCT has the duty of perpetual care of each of our conservation easements and must be here forever to enforce their conservation values. Making a gift to SFCT in your will or estate plan is a way to give back to your community and permanently protect the trails, land, air, water and ecosystems of our beautiful region. Just like the work of SFCT, your planned gift – no matter how large or small – will endure and benefit future generations.

Each year, SFCT works with hundreds of volunteers to provide safe, accessible trails so you can easily access the life-enhancing qualities of the outdoors.



Equestrians enjoy a ride in the Galisteo Basin Watershed, where SFCT has over 12,000 acres preserved by conservation easements. Photo by Nevada Wier.



The following commonly used planned giving options may provide you with tax savings while supplying revenue to support SFCT's conservation and trails work, as well as its education and community programs.

Please note that the Santa Fe Conservation Trust is not making any recommendations regarding the best planned giving option for you. We encourage you to consult with a trained professional, such as a certified financial planner, certified public accountant or an attorney who specializes in estate planning. The following is for informational purposes only.

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Santa Fe's iconic landmarks like Atalaya Peak, Sun Mountain and Cerro Gordo are all protected by SFCT conservation easements. Photo Credit: Don Usner

## HOW TO BENEFIT SFCT IN YOUR WILL OR REVOCABLE TRUST

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Future gifts are generally made as part of your Last Will and Testament or Revocable Trust, wherein you specify that the Santa Fe Conservation Trust will receive gifts of cash, equities and/or other assets, such as real estate, art, etc.

SFCT can be named as a beneficiary in your estate in a number of ways:

- Outright Bequest—You can specify a gift of cash, securities, and/or other assets.
  - Residual Bequest—A residual bequest provides that, after all other gifts are made to other named beneficiaries (children, etc.), the amount remaining in the estate is gifted to SFCT.
  - Contingent Bequest—In a contingent bequest, SFCT will receive certain assets only if a named individual does not survive you. This provision recognizes the need to provide first for the security of others, but if that need does not exist at the time of your passing, SFCT can receive the benefit.
  - Testamentary Trust—A trust is created upon your death, and provides income for another person or persons for the duration of their life, after which the principal ultimately passes to SFCT. Alternatively, you can designate that the income go to SFCT for a certain number of years and that the principal ultimately pass to family members or others.
  - Retirement Plans - You can designate SFCT as a remainder beneficiary of a retirement plan (401k, Keogh, or IRA). In doing so, your retirement plan can take care of your present needs, and, when you no longer need those funds, they become a generous gift to SFCT. To do so, follow the procedures of your plan administrator to designate SFCT as a beneficiary.
  - Life Insurance - Life insurance provides another way of making a gift to SFCT in the future, and you don't need a lawyer to do it. Oftentimes you can go online to get a beneficiary designation to make SFCT a direct or contingent beneficiary of an existing or new life insurance policy.
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Rainbow in the Galisteo Basin.  
Photo by Brooks Bollman.

## JOIN THE ATALAYA LEGACY SOCIETY

If you desire, please let us know when you have included the Santa Fe Conservation Trust in your estate plan. You will then become a member of the Atalaya Legacy Society, be recognized in our publications and receive a special invitation to our annual Legacy Luncheon to hear more about our work to connect people to the land and to each other through our conservation and trails work.

The Santa Fe Conservation Trust appreciates your interest and support! You can reach us at PO Box 23985, Santa Fe, NM 87502, call our Executive Director, Sarah Noss, at (505) 989-7019, or email her at [sarah@sfct.org](mailto:sarah@sfct.org). We would be pleased to meet with you or your advisors to provide additional information.

Making a gift in your will or trust is easy. You only need to specify that you bequeath certain assets to SFCT. If you already have a will, you can have your attorney prepare a codicil establishing the gift without having to rewrite your entire will. A revocable trust can be easily amended. Your attorney can work with you on the language to include, or contact SFCT for more information.

If you are considering a bequest of non-cash property, it is wise to discuss this with a representative of the Santa Fe Conservation Trust to ensure that the intent of the gift is known, and that SFCT has the capacity to receive the donation.

It is also possible to make gifts of real estate or conservation easements in your will. Please contact SFCT if this is something you are considering, as there are special considerations to discuss.

We have summarized some of the more common planned giving options, but there are many others. Always consult with your accountant, attorney and/or tax advisor on how these general rules apply to your personal situation.

It was Santa Fe's amazing trail system that inspired Denise and Jay Sessions (center) to include SFCT in their estate plan. Here they are pictured with Brad and Kathy Holian, both former board members and easement benefactors with SFCT.





# Who We Are

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Santa Fe Conservation Trust partners with our community to keep northern New Mexico's living lands and people flourishing together. We protect culturally and environmentally significant landscapes, ignite people's passion for nature and enable the continual regeneration of our healthy place.

Since 1993, SFCT has worked with land-owners and community partners to permanently protect over 40,000 acres in Santa Fe, San Miguel and Rio Arriba Counties. We've also had a hand in the creation of over 75 miles of trails in and around Santa Fe, and our outreach programs make these wonderful resources available to everyone.

*Deer in Pecos at Sunset*  
Photo by Phil Howes



**SANTA FE CONSERVATION TRUST**

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