Keeping Wealth in Montana

The power of community wealth.

$123 billion. That is the estimated 50-year wealth transfer from one generation to the next in Montana, between 2010 and 2060. The question we must ask is this: How much of that wealth will remain in the communities and for the communities that helped build it?

Here in Montana we’ve experienced the effect of wealth leaving our state. Communities have lost services, seen local businesses shut down and watched as children move away. Year after year it becomes more difficult to support local hospitals, parks, churches, youth and senior centers, theaters and symphonies, museums and more.

This trend doesn’t have to continue though. Here at the Montana Community Foundation, we help build permanent wealth to invest in Montana communities and the nonprofit organizations that make our towns the places we love to call home. By capturing just five percent of the 50-year transfer in permanently endowed funds, we will generate approximately $307 million a year for Montana nonprofits and communities.

Imagine what we could accomplish.
The transfer of wealth is happening every day. It’s happening right now. Contact us today to learn how you can help preserve Montana’s future.

How you can help:
• Think about what makes Montana special to you and commit to give to your passion.
• Call the Montana Community Foundation, your local community foundation, or your favorite charity to learn about leaving a legacy for Montana’s future.
• Create an estate plan or adapt your current plan to help a cause that is important to you.
• Talk to others about the importance of remembering their community in their plans.
• Give at least five percent of your estate to the causes that matter to you, now and for the future.

*The information in this publication is not intended as legal or tax advice. For legal or tax advice, please consult your attorney and/or tax professional.

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