



MONTANA ENDOWMENT TAX CREDIT

The Montana Endowment Tax Credit (METC) allows donors to pay less in Montana state income taxes when they give a planned gift to a qualified Montana charitable endowment. Whitefish Community Foundation holds over 40 qualified endowment funds that directly benefit our community nonprofits.

| | FOR INDIVIDUALS | FOR BUSINESSES |
|--|--|--|
| TYPE OF GIFT | Planned Gift (Deferred Gift Annuity) of cash or appreciated securities. <i>Minimum gift size \$10,000.</i> | Direct gift of cash or appreciated securities. <i>No minimum gift size.</i> |
| AMOUNT OF MONTANA ENDOWMENT TAX CREDIT | 40% of the initial gift, up to max credit of \$15,000 per taxpayer (\$30,000 for joint filers). <i>The remaining gift amount provides a federal tax deduction.</i> | 20% of gift amount, up to max credit of \$15,000. <i>The remaining gift amount provides a federal tax deduction.</i> |

NOW

MEET

Schedule a planning meeting

GIVE

Make your gift and claim a MT tax credit

SIGN

Finalize deferred annuity paperwork

IN 5 YEARS

INVEST

Your gift will grow over the 5-year annuity period

SIGN

Release your interest in the annuity

BUILD

Your gift forever benefits the nonprofit endowment of your choice

Donor Advised Funds, charitable distributions from an IRA, and private foundations can support nonprofit endowment funds directly but are not eligible for the Montana Endowment Tax Credit.

**NOT INTERESTED
IN THE MONTANA
ENDOWMENT
TAX CREDIT?**

- Join the Circle of Giving with a gift of \$5,000 or more annually
- Open a Donor Advised Fund
- Create a Legacy Fund in your family estate planning
- Donate from your IRA as a Qualified Charitable Distribution



**FOR MORE
INFORMATION
ON GIVING
PLEASE CONTACT:**



Whitefish Community Foundation

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