



With a gift to BHHT in your will

You can create a legacy in your community

You can protect the land you love forever

You can inspire a new generation

The Steward's Circle honors those who have created a legacy through Blue Hill Heritage Trust.

A gift in your will, in a trust, or by beneficiary designation will yield large and lasting returns for future generations. It will help ensure long-term stewardship of precious conservation land and your communities.

To receive more information, please contact us:

Blue Hill Heritage Trust
PO Box 222
Blue Hill ME 04614
207-374-5118
bluehillheritagetrust.org/planned-giving-bequests/

BLUE HILL
HERITAGE TRUST



Creating a Conservation Legacy in your Community

There are moments when you reflect on all you have achieved, on what you hope to accomplish still, and you consider how you will write your story in ways that embody your values and your vision.

Perhaps you wish to make a gift to Blue Hill Heritage Trust a part of your legacy, but are concerned about making commitments you might not be able to keep, or using resources you may need yourself in the future.

You may be surprised to learn that:

- Most legacy gifts require no immediate donation, and your gift transfers only after your lifetime.
- You are not locked in to a choice you make today and can always change your mind.
- Your gift is welcome in any amount, so you can make loved ones and BHHT your beneficiaries.

These are some of easiest ways to make a gift to BHHT:

A Gift from Your Will or Trust: A gift from your will or trust is a time-honored way of ensuring that your support of BHHT and the magnificent land you love continues for generations to come.

- To leave the majority of funds to your loved ones, name BHHT to receive a specific amount or percentage.
- To leave BHHT what's left after loved ones are provided for, use a residuary bequest.

Gifts of Retirement Plan Assets: Many of us are frugal, accumulating savings for a long and comfortable retirement. Those same habits often result in not using all the money we've saved. By designating BHHT as beneficiary of your retirement plan you can:

- Leave other, less heavily taxed assets to your family.
- Change your beneficiaries at any time, retaining flexibility.
- Act without legal expense. Simply request a change of beneficiary form from your plan provider.

Gifts of Life Insurance: Many have life insurance policies that have long since served their purposes. These can make wonderful gifts to BHHT. Just ask your insurer for the appropriate forms to make BHHT the owner of a paid-up plan, or the beneficiary of your policy.

Gifts of Real Estate: You may wish to gift conservation land to BHHT, but you can also give property to be sold to further BHHT's mission. A gift of real estate can be made during your lifetime, or through your will. You can even gift property while retaining the right to live on it during your lifetime.

Your Neighbors in the Steward's Circle

John & Carol Merrifield



share the love of nature that surrounds us. In our life here, we have devoted time and resources to supporting the work of the Trust.

“In so doing, we have been part of the long-term commitment that BHHT has made and continues to make in protecting and caring for the lands and waterways, the wildlife corridors, and the scenic value that we all enjoy. To protect that commitment into the future, we have made a planned gift to BHHT in the form of a life insurance policy. It was easy to do and has given us the satisfaction of knowing that we can make a difference for the generations that will follow.”

Bob Murphy & Betsy Adams



“We chose BHHT as a beneficiary primarily because of the great work they do for our local community. We admire the way they manage and preserve their lands, protecting property while making it available for public recreational and educational use. They work in a very transparent manner and we recently learned that they

voluntarily pay property taxes – yet another way their organization benefits our community.

“When we made our will, we spent a lot of time considering what to do with our home in Maine. We came up with a plan to leave it to a group of friends, who love it almost as much as we do, but in a way that will eventually benefit the community which has brought such joy to our lives. Our friends will have the use of the house during their lives, but it will not pass on to their heirs. Instead, it will eventually go to the Trust with instructions that it be sold to benefit their stewardship fund, helping care for all their conserved properties and trails. We feel this will be a win for everyone.”

To receive more information on joining the Steward's Circle, please contact:

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