



WAYS TO GIVE

Protecting the Places You Love

Your guide to supporting conservation today and for generations to come

STCWE
LAND TRUST

Dear friends,

Some of the most cherished places in your life—where you walk with your family, ski through the quiet woods, or watch the sun set over the mountains—exist today because someone had the foresight to protect them.

Our forests, farms, and scenic open spaces are a vital part of our shared future. They provide clean water, support wildlife, grow food, offer adventure, and connect us to something bigger than ourselves.

Since 1987, with the help of people like you, Stowe Land Trust has conserved more than 7,100 acres in Stowe, Morristown, and Waterbury. But protecting land is just the beginning. Stewarding it forever requires dedication, vision, and—critically—sustained support.

This guide outlines the many ways you can make a lasting impact. Some gifts provide immediate support. Others ensure your legacy endures long into the future. Many options may also benefit your family or estate planning goals.

However you choose to give, I hope you'll feel proud knowing your gift is helping to protect the lands and waters you love, now and forever.



With gratitude,

A handwritten signature in black ink that reads "Tom Rogers". The script is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Tom Rogers

Executive Director, Stowe Land Trust





connect
to something
more



Gifts of Stocks, Bonds & Mutual Funds: Double the tax benefits of your gift

Donating long-term appreciated assets is one of the most tax-efficient ways to give. When you donate securities, you avoid capital gains taxes and can claim a charitable deduction for the full fair market value.

This type of giving allows you to support conservation without dipping into your cash reserves. It's an excellent strategy for donors who hold assets that have grown in value and want to make a meaningful impact while preserving liquidity.

YOUR BENEFITS

- ▶ Avoid capital gains tax
- ▶ Claim a full market value deduction
- ▶ Support conservation with assets, not cash

HOW TO DONATE SECURITIES

Stowe Land Trust has a broker account with Charles Schwab. To initiate a transfer of stock or other securities:

- ▶ Contact Tom Rogers at **802-253-7221** or **tom@stowelandtrust.org** so that we can confirm the incoming transfer and provide you with a receipt.

- ▶ **Provide the following information to your broker:**

Brokerage Firm: Charles Schwab & Co, Inc.

DTC #: 0164, Code 40

Name: Friends of Stowe Conservation, Inc.

Account #: 2480-6192

Tax ID / EIN: 03-0307155

Address: Charles Schwab & Co, Inc,
AS Document Control, PO Box 982600,
El Paso, TX 79998-6192

Donor Advised Funds:

Flexible giving on your timeline

Donor Advised Funds, or DAFs, offer an easy and flexible way to support the causes you care about. With a donor-advised fund, you can make a charitable contribution, receive an immediate tax benefit, and then recommend grants to Stowe Land Trust over time.

You can also name Stowe Land Trust as a final beneficiary, ensuring that the remaining balance of your fund supports conservation in perpetuity. Many families find DAFs to be a helpful tool for involving younger generations in their philanthropy.

YOUR BENEFITS

- ▶ Simplifies giving and record-keeping
- ▶ Can be invested for growth
- ▶ May reduce tax burden
- ▶ Supports your long-term charitable goals

HOW TO GIVE THROUGH YOUR DAF

- ▶ Through your donor portal or philanthropic advisor, direct grants to:

Friends of Stowe Conservation, Inc.
Tax ID / EIN: 03-0307155
- ▶ Confirm your grant with us so that we can properly acknowledge your gift. This is important even if your grant is anonymous.

“ Using a Donor Advised Fund decouples the charitable tax deduction part from the granting part, so I am able to be more tax efficient and better manage the entire process of supporting organizations like Stowe Land Trust.”

—**Dave Wilkens**, Pinnacle & Legacy Society Member



A small bird with yellow, black, and white plumage is perched on a branch with white flowers. The bird has a yellow crown, black face, and white body with black and yellow streaks on its wings. It is looking to the left. The background is a soft-focus green and white.

Gifts of Real Estate: Your land, lasting impact

For those who care deeply about land, a gift of real estate is one of the most direct and lasting ways to make a difference. Land can be gifted in several forms: undeveloped woodlands, farmland, a family homestead, or even residential or commercial property. Whether it's a beloved property you want to see protected or an asset you no longer need, your gift can help ensure the beauty and character of this region remain intact.

Some donors contribute land with high conservation value for permanent protection. Others donate property that may be sold, with proceeds supporting Stowe Land Trust's conservation and stewardship work. Either way, the impact is significant: gifts of real estate help protect critical wildlife habitat, preserve scenic views, connect trail networks, and support working lands.

Stowe Land Trust works closely with donors and their advisors to evaluate the land, understand your goals, and determine the most effective way to structure the gift. Gifts can be immediate or planned, full or partial interests, and may even include retained life estates that allow you to continue using the land during your lifetime.

BENEFITS TO YOU

- ▶ Create a permanent conservation legacy
- ▶ Avoid capital gains taxes on appreciated property
- ▶ Receive a charitable income tax deduction
- ▶ Simplify your estate and reduce potential tax burdens
- ▶ Feel good knowing you've protected something irreplaceable

BENEFITS TO STOWE LAND TRUST'S MISSION

- ▶ Adds to our network of conserved lands
- ▶ Enhances habitat and recreation corridors
- ▶ Strengthens our stewardship capacity with resalable gifts
- ▶ Demonstrates the power of community-led conservation

HOW TO MAKE A GIFT OF LAND

Gifts of land have always been at the heart of our work.

Contact us to explore how a gift of land or real estate can support your vision—and our shared future.

“ My grandparents purchased land in Moscow to preserve the view and wildness of the area. They never wanted it to be developed. It's meaningful to see the DuMont name on the sign and realize that our family started this, and now DuMont Meadow is here for everyone forever.”

—Malia DuMont



Retirement Assets:

Turn taxable assets into tax-free gifts

Retirement accounts such as IRAs and 401(k)s are often subject to income taxes when inherited by individuals. There are two ways to make a gift from your retirement account. Designating Stowe Land Trust as a beneficiary of your retirement account is a highly tax-efficient way to make a gift. If you are 70 ½ or older, you also can make a Qualified Charitable Donation directly from your retirement account to Stowe Land Trust. A QCD does not count as taxable income but does count toward your Required Minimum Distribution.

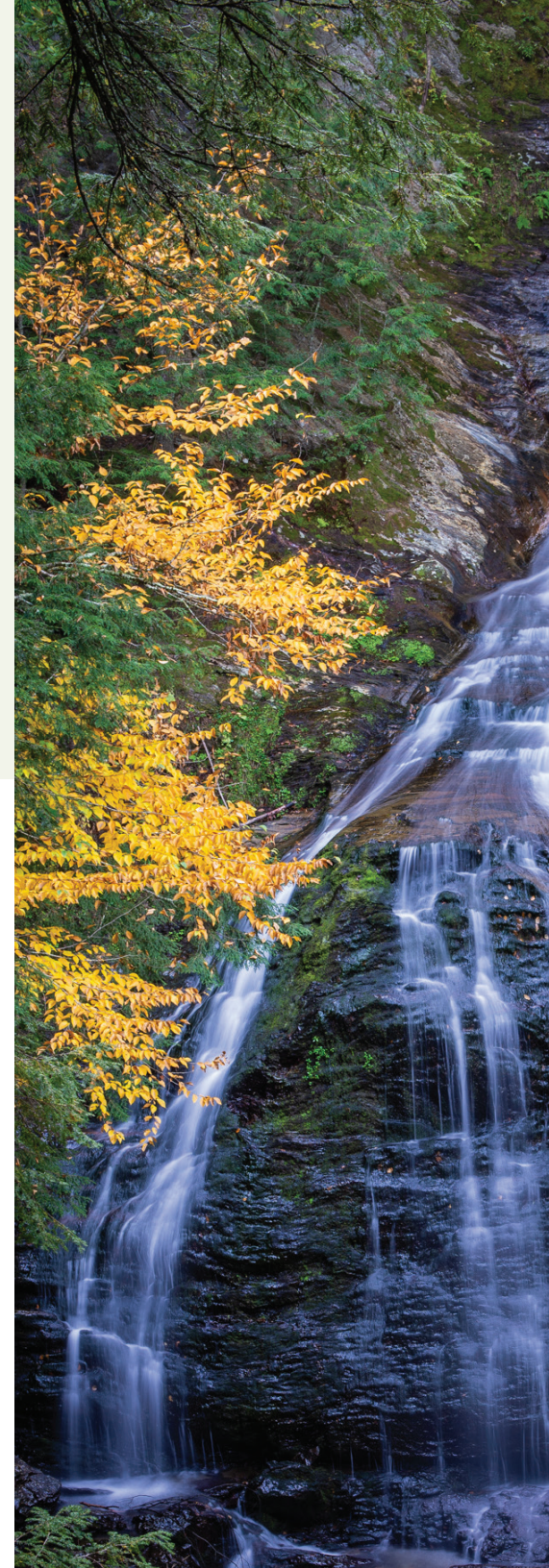
This simple act can make a profound impact while preserving other assets for your loved ones.

YOUR BENEFITS

- ▶ Avoid income taxes for heirs
- ▶ Simple to designate
- ▶ No need to change your will

HOW TO DONATE RETIREMENT ASSETS

- ▶ To make a gift from your retirement account after your passing, simply update your beneficiary to Stowe Land Trust. No changes to your will are required.
- ▶ To make a QCD, contact your IRA custodian and request a direct distribution to Stowe Land Trust, 6 Sunset Street, Stowe, Vermont 05672, EIN: 03-0307155.





Life Insurance:

Transform your policy into conservation

Life insurance can be a powerful way to make a meaningful gift to Stowe Land Trust—either now or in the future. You can name Stowe Land Trust as a full or partial beneficiary, or transfer ownership of a policy and potentially receive an immediate tax deduction.

Another option is to sell a no-longer-needed policy through a life settlement. This can result in a higher return than surrendering the policy, allowing you to donate the proceeds and make a larger impact. You'll also eliminate future premium payments and may qualify for a charitable income tax deduction.

YOUR BENEFITS

- ▶ May reduce your taxable estate
- ▶ Eliminate premium obligations
- ▶ Increase the value of your charitable gift
- ▶ Make an impact you can see in your lifetime

HOW TO MAKE A GIFT THROUGH LIFE INSURANCE

Contact Stowe Land Trust to discuss beneficiary designation changes or the transfer of ownership to Stowe Land Trust. We have a local resource who can guide you.



OUR MISSION

Conserving the land and waters we love
to enhance quality of life for all
connected to the Stowe area.

Charitable Gift Annuities or Trusts: Support Stowe Land Trust while providing income for life

If you want to make a substantial gift while maintaining financial security, consider a charitable gift annuity or charitable remainder trust. These planned giving tools allow you to support Stowe Land Trust while receiving fixed payments for life.

These gifts also can help reduce or eliminate capital gains taxes and provide an immediate charitable deduction. They are an ideal solution for donors looking to make an enduring impact without sacrificing financial stability.



YOUR BENEFITS

- ▶ Lifetime fixed income
- ▶ Immediate charitable deduction
- ▶ May reduce or eliminate capital gains tax

HOW TO ESTABLISH A CHARITABLE GIFT ANNUITY OR TRUST

To discuss a Charitable Gift Annuity, contact Tom Rogers at tom@stowelandtrust.org or (802) 253-7221. We will need your date of birth, gift amount, and asset type to get started on a gift annuity agreement.

Your attorney or financial advisor will need to draft the trust document, specifying term, payout rate, and remainder beneficiary.

Join the Legacy Society: Be recognized for your commitment

When you make a legacy gift, you become part of the Stowe Land Trust Legacy Society. As a member, you receive special recognition, invitations to events, and the satisfaction of knowing you are part of something lasting.

You can choose to be acknowledged publicly or remain anonymous. Either way, we are grateful for your trust and commitment to protecting the places that matter most.



legacy
society





A legacy that lasts:

Gifts Through Your Will or Trust

Including Stowe Land Trust in your will or living trust is one of the simplest and most popular ways to create a lasting legacy. A bequest costs you nothing during your lifetime and ensures that your values live on through meaningful conservation.

You can leave a specific dollar amount, a percentage of your estate, or the remainder after other obligations are met. This type of gift is easy to adjust if your circumstances change and can often result in estate tax savings.

YOUR BENEFITS

- ▶ Simple to arrange or update
- ▶ No cost during your lifetime
- ▶ May reduce estate taxes
- ▶ Legacy Society Membership

HOW TO MAKE A LEGACY GIFT

- ▶ You can designate Stowe Land Trust as a beneficiary in your will or estate planning at any time through your attorney or financial advisor.
- ▶ We appreciate you letting us know if you've designated Stowe Land Trust in your estate plans, as it helps our organization plan for the future.

READY TO MAKE A LEGACY GIFT?

Here is sample language to share with your attorney or financial advisor:

"I give [% of my estate / \$ / the rest and residue of my estate] to Stowe Land Trust, a nonprofit organization located in Stowe, Vermont, EIN 03-0307155, for its general charitable purposes."



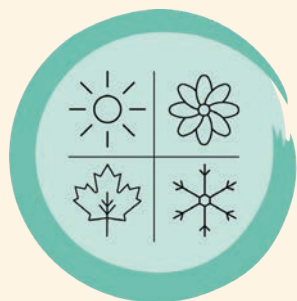
“ As a CEO and business owner for many years, I’ve seen how much Vermont’s economy depends on a healthy environment. Protecting the land protects the vitality of our local businesses, our quality of life, and the next generation”

—Bill Davis,
Pinnacle Society Chair

Giving Circles:

Make a commitment to conservation

Join a Giving Circle to help conserve and steward the lands and waters you love.



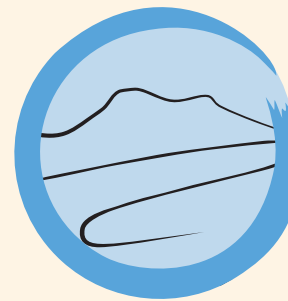
EVERY DAY LAND SUPPORTER, \$365+

Every day, every season you're protecting wildlife habitat, world-class recreational opportunities, public land, scenic vistas, and a healthy, resilient environment in the Stowe area. For as little as one dollar a day, Every Day Land Supporters create a strong foundation of community support to advance our shared mission of conserving the land and water we love to enhance quality of life for all.



PINNACLE SOCIETY, \$1,000+

True champions of the land, Pinnacle Society members are deeply invested in the health of our environment today and for generations to come. Your contribution of \$1,000 or more not only supports land stewardship and conservation, it also gains you access to exclusive events and gatherings with fellow Pinnacle Society members throughout the year.



MANSFIELD CIRCLE, \$25,000+

The Mansfield Circle represents a community of visionaries whose generosity shapes the future of the region. Through annual gifts of \$25,000 or more, these dedicated philanthropists help preserve the natural beauty, wildlife, and open spaces that make this valley extraordinary. Their leadership ensures that the landscapes we cherish today will endure—protected, vibrant, and full of life—for generations to come.

A photograph of a young child with blonde hair, wearing a pink shirt and dark shorts, lying on their back on a large, mossy, fallen tree trunk that spans a small stream. The child is holding onto a standing tree trunk with their hands. The stream flows through a lush green forest with many trees and rocks visible in the water and along the banks.

“The best time to plant a tree
was 20 years ago.
The second-best time is now.”

—Chinese proverb

Let's Start a Conversation

Whether you're making a gift today or planning for tomorrow, your support helps keep the Stowe area wild, beautiful, and accessible for generations to come. We're here to help you find the giving option that's right for you and your goals.

Contact

Tom Rogers
Executive Director
(802) 253-7221
tom@stowelandtrust.org
EIN: 03-0307155

STOWE
LAND TRUST

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