



Planned Giving

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Help the **Texas Agricultural Land Trust** as we work to protect the rural lands that bring us innumerable benefits and resources we all depend on, and that connect us to that uniquely Texan legacy of rugged independence, unlimited opportunities, and wide-open spaces.

Together, we can conserve the Texas we love for generations to come.

The term “gift planning” refers to future charitable gifts made to TALT that may require planning now. Planned gifts secure the future of TALT’s work, while providing you with the satisfaction and excitement of knowing that your vision will live on forever. Gift planning can also provide valuable tax benefits and/or income for yourself or others.

POPULAR WAYS TO GIVE

GIFT IN YOUR WILL OR LIVING TRUST

Deepen Your Connections

You want to leave money to Texas Agricultural Land Trust in your will. You also want the flexibility to change your will in the event that life circumstances change. You can do both. In as little as one sentence, you can complete your gift. This type of donation to TALT in your will or living trust helps ensure that we continue our mission for years to come.

Fund Your Donation With:

- Cash
- Appreciated Securities
- Real Estate*
- Tangible Personal Property

*TALT can receive real estate such as farms or ranches, so you can bequeath your most precious asset and be assured that your wishes to protect your land and legacy in perpetuity is a possibility.

BENEFICIARY DESIGNATIONS

Make a Gift in 3 Easy Steps

Not everyone wants to commit to making a gift in their wills or estates. Some prefer the increased flexibility that a beneficiary designation provides by using:

- IRAs and retirement plans
- Life insurance policies
- Commercial annuities

It only takes three simple steps to make this type of gift. Here's how to name Texas Agricultural Land Trust as a beneficiary:

1. Contact your retirement plan administrator, insurance company, bank or financial institution for a change-of-beneficiary form.



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2. Decide what percentage (1 to 100) you would like us to receive and name us, along with the percentage you chose, on the beneficiary form.
3. Return the completed form to your plan administrator, insurance company, bank or financial institution.

Fund Your Donation With:

- Retirement Plan Assets
- Life Insurance
- Commercial Annuities
- Bank Accounts, Certificates of Deposit or Brokerage Accounts

NEXT STEPS

1. Contact Dina C. McIlhenny at **(210)-826-0074** or **dmcilhenny@txaglandtrust.org** for additional information on beneficiary designations and how they can help support TALT with our mission.
2. Talk to your financial or legal advisor to learn which assets will or will not trigger taxable income when paid to a beneficiary.
3. If you name TALT in your plans, please use our legal name and federal tax ID.

Legal Name: Texas Agricultural Land Trust Foundation

Address: PO Box 6152, San Antonio, TX 78209


Federal Tax ID Number: 46-4540280

Information contained herein was accurate at the time of posting. The information on this website is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. State law may further impact your individual results.



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