



ROUGHRIDERS SOCIETY

The Boone and Crockett Club's Roughriders Society recognizes those Individuals who have integrated their financial estate plans to include the Boone and Crockett Club Foundation and its mission.



It is the policy of the Boone and Crockett Club to promote the guardianship and provident

OUR MISSION

management of big game and associated wildlife in North America and maintain the highest standards of fair chase and sportsmanship in all aspects of big game hunting, in order that this resource of all the people may survive and prosper in its natural habitats. Consistent with this objective, the Club supports the use and enjoyment of our wildlife heritage to the fullest extent by this and future generations.

Ken Davis
B&C Regular Member

“As an organization, the Boone and Crockett Club’s very uniqueness is what has made it so successful and has enabled it to flourish for more than a hundred years. The

WHY GIVE TO B&C

dedicated and personal involvement of the members in doing the work of the Club, coupled with a deep commitment to the conservation of our wildlife and a strong leadership vision, are the core values which have empowered the Club to become the principal champion of the perpetuation of our Wildlife Cultural Heritage.

This essential uniqueness ensures that the Club will outlive us all and continue to preserve our Wildlife Cultural Heritage. That is the reason why Kathy and I have chosen to designate the Boone and Crockett Club Foundation our primary charitable beneficiary.”

Ken and Kathy Davis have designated the Boone and Crockett Club Foundation as the charitable remainder beneficiary of their Charitable Remainder Trust.



The Boone and Crockett Club was founded by Theodore Roosevelt at a time when it was one of only two organizations in America dedicated to the conservation of our nation's natural resources. Roosevelt, who was deeply concerned over the plight of America's wildlife, hosted a dinner in December of 1887 for ten like-minded sportsmen friends. This influential

THE BOONE AND CROCKETT CLUB AND YOU

group recognized that what had happened in the preceding decade to the vast bison herds and the millions

of passenger pigeons could easily happen to other species unless efforts were made to control market hunting and provide wildlife the ability to coexist with man. That evening the Boone and Crockett Club was founded with the mission to promote two major goals: the conservation of critical wildlife habitat and the principle of hunting in fair chase.

You can help further the work and vision of these leaders by becoming a member of the **Roughriders Society**. The Boone and Crockett Roughriders Society is a planned giving program designed for Club members and friends who wish to leave a lasting legacy by including the Boone and Crockett Club Foundation and its mission in their financial estate plans. Funds contributed to the Foundation are held in a permanently restricted fund, which supports the Club's key conservation leadership programs. This recognized group of the Club's special friends serves as a partnership, which encourages like-minded individuals to participate through a variety of planned giving vehicles.

Planned giving is not about death. It is about what is best for you and your family. It lets you plan while you are alive and choose where you want to leave your legacy. Careful planning can ensure that your property is distributed in the manner you choose. It can also significantly reduce administrative costs and estate tax liability. Please fill out the enclosed Confidential Reply Form today.

Your answers to the following three questions will help lead you in the direction of which planned gift may be the best for you and your family.

1. Do you have assets that you need to retain total use of during the rest of your life, but would like to see them used by a favorite charity after you are "gone"? Consider a testamentary gift through your **will, life insurance policy, or retirement funds.**

2. Do you have assets from which you need to retain benefits or income from now, but want those assets to go to charity in the future? Consider a gift that will pay you (and/or other beneficiaries) income now or beginning at some predetermined date in the future. These life income producing planned giving instruments include **charitable gift annuities** and **charitable remainder trusts**.
3. Do you have substantial assets that you want to pass to your children or other heirs and do not need the asset or income from that asset now? Consider a **charitable lead trust**.



Wills

A will represents perhaps the simplest way to leave a wildlife legacy. A specific bequest or a residual portion of your estate could result in meaningful estate tax savings and could establish a permanent endowment in the donor's name or someone else as designated. Such a testamentary gift can also be designated for a specific approved use at the Boone and Crockett Club Foundation.

PROGRAMS AND INSTRUMENTS FOR GIVING

Life Insurance

Making the Boone and Crockett Club Foundation the owner or

beneficiary of a life insurance policy is a good way to make a gift without an upfront transfer funds.

Retirement Funds

Millions of Americans own a Qualified Retirement Plan (e.g. IRAs, 401(k)s, 403(b)s, Keogh Plans, Mutual Funds). Naming the Foundation as one of the beneficiaries or sole beneficiary of your retirement plan is a simple way to support the Boone and Crockett Club Foundation. In addition, the proceeds would be tax-free for the Foundation, where as the income would be taxable to your heirs.

Charitable Gift Annuity

One of our most popular programs, the Boone and Crockett Club Foundation Charitable Gift Annuity, enables you to exchange assets for an immediate or future fixed, guaranteed income. For those who are still in their earning years, Boone and Crockett Club Foundation annuities can offer large income tax deductions now and generous income later.

Charitable Remainder Trust

A Charitable Remainder Trust enables you to place low-basis, low-yielding, highly appreciated assets in trust for a subsequent sale without incurring the capital gains tax! You retain an income and also generate immediate income tax deductions. As the name implies, when the trust term ends (Charitable Remainder Trusts can be structured for life or a term of years), the Boone and Crockett Club Foundation receives the assets remaining in the trust.

Charitable Lead Trust

This type of charitable trust pays the “lead interest” (i.e. the income) to the Boone and Crockett Club Foundation for a period of years with the “remaining interest” ultimately returning to the donors or passing to other family members. As such, it is essentially the opposite of the Charitable Remainder Trust described above. Charitable Lead Trusts are used primarily to pass substantial assets to heirs with minimal gift and estate tax exposure or to generate a large income-tax deduction in a year when a significant taxable event, such as the sale of a business or the realization of a large capital gain, has occurred for the donor.

Real Estate

Real estate can be transferred to the Boone and Crockett Club Foundation. If you are interested in a gift which involves real estate, please contact George Bettas at the Boone and Crockett Club headquarters.

Real Estate

Real estate, such as a farm, business, primary residence, or vacation home, can be transferred to the Boone and Crockett Club Foundation to provide an immediate tax deduction. Or, if you were planning to sell the real estate, but can't afford to give the entire asset, consider gifting an undivided interest in the property to the Boone and Crockett Club Foundation just prior to the sale. Such a maneuver will generate an income-tax benefit for you to help offset the gain realized on the portion you retained! And certain real estate can be given to the Boone and Crockett Club Foundation for future sale, thus avoiding capital gains, with the after sale proceeds paying you an income for life.

Although the above planned giving avenues and tools are not comprehensive, they do provide ideas to stimulate your thinking and generate questions. All of these concepts require professional guidance both financially and legally. The Boone and Crockett Club Foundation looks forward to working with you and your professional advisors as we chart new hunter-conservationist initiatives for the future.

~ OPEN ~

Roughriders Society Members receive a special recognition pin and plaque. They are also recognized in the Gallery at the Boone and Crockett Club's National Headquarters in Missoula, Montana, and in official Club publications. Roughriders Society Members will also receive a complimentary subscription to *Fair Chase* magazine.

William B. Ruger
B&C Honorary Life Member

"I have always been proud of my membership in Boone and Crockett, and felt that I was one of the luckiest of men to be associated with a group I genuinely liked, and which was devoted to the same interests that have

TESTIMONIAL

stimulated me for a lifetime. Not only that, but Boone and Crockett over its long history, has acquired immense prestige, initially because of the character of the people who make up the Club."

Bill's belief in the Club and the depth of his convictions are fully apparent in his passing. Through his Charitable Remainder Trust the Boone and Crockett Club Foundation received a generous gift that added greatly to the Foundation's endowment and assisted the Club in continuing its work, which, in Bill's words, "are devoted to the same interests that have stimulated me for a lifetime.



ROUGHRIDERS SOCIETY

CONFIDENTIAL REPLY FORM

- I plan to include the Boone and Crockett Club Foundation in my estate plans and would like to become a member of the Roughriders Society. When I've completed my estate plan, I will submit the appropriate documentation to the Boone and Crockett Club.
- I have already included the Boone and Crockett Club Foundation as part of my estate plan and would like to become a member of the Roughriders Society.
- I would like to learn about making a donation to the Boone and Crockett Club Foundation Roughriders Society in exchange for lifetime payments (charitable gift annuity). Please send me an illustration of how this could work for me. *Birth dates are needed to determine your specific financial benefits.*

My birth date: _____ Spouse's birth date (if joint payments): _____

Date you would like payments to begin: _____

Please send me information based on the following gift:

- Cash in the amount of \$ _____ (\$10,000 minimum)
- Stocks worth \$ _____

Name

Address

City State Zip Code

Telephone (Home) (Work)

E-mail Address

Return completed form to:
Boone and Crockett Club Foundation
Roughriders Society
250 Station Drive
Missoula, MT 59801