As much as you might like to,

you can’t stay in Montana forever.

(someday you gotta leave this earth.)

But your legacy

is welcome to stay.

Just like the Beatles, we get by with
a little help from our friends.

A very special thanks goes to

for their financial support of this guide.

For the Advancement of Nonprofits

2008 Guide to Supporting Montana’s Local and County Community Foundations

P.O. Box 1514
Helena, MT 59624
ph: (406) 443 - 5860
fx: (406) 443 - 4046
e: info@bigskyinstitute.org
w: www.bigskyinstitute.org
"Over the next ten years, it is projected that nearly nine billion dollars will pass out of the estates of Montana residents. Local and county community foundations are critical to retaining a portion of that wealth to preserve Montana’s legacy.”
— Governor Brian Schweitzer
MONTANA’S FUTURE GENERATIONS COULD USE A LITTLE PUSH.
A Letter to Financial Advisors

You probably don’t think of yourself as a local hero. Chances are, you don’t rescue babies from burning buildings, cure cancer, or bring the bad guys to justice.

Yet, as a trusted financial advisor, you hold the key to the future of your community. You have the power to unlock philanthropic gifts of unparalleled dimension.

As you will read about in this guide, Montana—like the rest of America—is undergoing the largest intergenerational transfer of wealth in history. Because of our demographics, this transfer will happen sooner in Montana than in the urban states.

This gives financial advisors unprecedented opportunity to use the tools of their profession not only to serve their clients’ financial and estate planning needs, but also to connect Montanans’ love of their communities to charitable gifts that help build local community foundations. These gifts are given in perpetuity and, like a rolling stone, build momentum by inspiring others to leave a philanthropic legacy. As a result, the community develops an ever-expanding resource to serve untold generations into the future.

Montanans are generous. Whether it’s the tradition of Indian potlatches or community barn raisings, helping our neighbors, friends, and family runs deep and powerful throughout our state, and has for generations. But philanthropic giving that permanently endows local community foundations is new territory for Montana. Most of the more than 70 local community foundations highlighted in this guide are less than ten years old. Most have no staff. Most have very limited resources to inform and engage prospective donors.

Despite these challenges, these local community foundations collectively hold well over $15 million in assets, and cumulatively have awarded more than $4.5 million in grants. A very good start.

This is where you come in.

Please look over this guide. Use the suggested talking points to engage your clients. Pique their interest in leaving a philanthropic legacy. Show them the map of the local community foundations throughout Montana. Help them plan smartly for themselves, their family, and the community they love.

Be the key that unlocks philanthropic gifts to your local community foundation, and you will be a local hero – forever!

Michael D. Schechtman
Executive Director
Big Sky Institute for the Advancement of Nonprofits

October, 2008
Community Foundations Active All Over the State

The numbers indicate the foundations in each county and are referenced in the index on page IV.

Hundreds of volunteers—nearly half the community—pounded nails, prepared meals and watched toddlers while older kids and their parents worked to build the Eagle’s Nest Playground in downtown Seeley Lake. In just five days, a school-ground park was transformed into a magical environment complete with slides, bridges, swings, rings, ladders and bars, plus a central pavilion for group gatherings. Many hands made Eagle’s Nest possible, including the Seeley Lake Community Foundation, whose initial grant of $2,500 provided a critical down payment on the $100,000 investment and demonstrated how a community foundation can play a central role in rural community development.

High school students compete for the opportunity to serve on the Broadwater Community Foundation Board. The Foundation started including students in order to make the county a better place to live, but soon realized that they are creating global citizens by preparing students to participate in or create local community foundations wherever they may choose to live in the future. Pictured are Leigh West, Lyndsey Little, and Laci Kennedy.

“The Park County Community Foundation is more than just a holding company for financial assets. It plays a leadership role in building a culture of philanthropy, engagement, and responsibility in the community.”

— Annette Leeland, Founding Board Member
In 1995, Anheuser-Busch offered a challenge grant to Havre Distributors to build a community foundation. Havre Distributors met the challenge and established the **Hill County Community Endowment**. The fund was dormant until 2004 when a small group of individuals came together to reinvigorate the endowment. Havre Distributors provided a $2,500 challenge grant, and the endowment grew to more than $10,000 in two years.

The HG Robinson House was developed by the Phillips County Historical Society into an area attraction. The house was the home of early residents of Phillips County and is adjacent to the Phillips County Museum. Funds provided by the **Phillips County Community Foundation** assisted with development of the historical gardens.

The **Joliet Community Foundation** was formed in 2000 when a group of community members came together to address the urgent community need for a local facility to house a senior citizen center, community library, and a volunteer ambulance service. The project received funding from the Montana Community Foundation’s Renaissance Grant Program, which helped keep the group focused on the goal and complete the Joliet Community Center.

Broadus was one of three Montana communities selected to participate in the Montana Community Foundation’s Ford Foundation Rural Initiative Beacon Community Project. The community was awarded $117,000 to develop local projects. In return, the community agreed to form the **Powder River Community Endowment Fund** and raise a matching amount for the community endowment.

“Our endowment fund will enable us to control our own destiny rather than waiting for others to decide our fate.”

— Christine Franklin, Executive Director

“The Foundation’s purpose reminds the community that everything we need is already here—we simply need to find it together. In the **Musselshell Valley Community Foundation**, we invite everyone to be a shareholder. As we say in our ranch family business, ‘Support is a circle.’”

— Bill Milton, President
List of Funds by County

Beaverhead
1 Western Montana Community Foundation

Bighorn
2 Billings Community Foundation
3 Hardin Area Community Foundation

Blaine
4 Blaine County Community Foundation

Broadwater
5 Broadwater Community Foundation

Carbon
6 Billings Community Foundation
7 Joliet Community Foundation
8 Red Lodge Area Community Foundation
9 Roberts Community Foundation

Carter
10 Carter County Community Foundation

Cascade
11 Great Falls Area Community Foundation

Daniels
12 Beacon Community Foundation

Dawson
13 Greater Glendive Community Foundation

Deer Lodge
14 Anaconda Community Foundation
15 Western Montana Community Foundation

Fergus
16 Central Montana Community Foundation
17 Denton Endowment
18 Grass Range Community Foundation
19 Moore Endowment
20 Roy Endowment
21 Winifred Endowment

Flathead
22 Columbia Falls Community Foundation
23 Community Foundation for a Better Bigfork
24 Flathead Community Foundation
25 Whitefish Community Foundation

Gallatin
26 Bozeman Area Community Foundation
27 Gallatin County Community Foundation
28 West Yellowstone Foundation

Garfield
29 Garfield County Endowment

Glacier
30 Blackfeet Community Endowment Fund

Golden Valley
31 Musselshell Valley Community Foundation

Granite
32 Western Montana Community Foundation

Hill
33 Hill County Community Foundation

Jefferson
34 Jefferson Valley Community Foundation

Judith Basin
35 Hobson Endowment
36 Judith Basin County/Stanford Endowment

Lake
37 Greater Polson Community Foundation
38 Lower Flathead Valley Community Foundation
39 Western Montana Community Foundation

Lewis and Clark
40 Lewis and Clark County Community Foundation
41 Lincoln Valley Community Foundation

Lincoln
42 Lincoln County Community Foundation
43 Tobacco Valley Community Foundation
McCones
44 Redwater Community Foundation

Meagher
45 Meagher County Community Foundation

Mineral
46 Mineral County Community Foundation
47 Western Montana Community Foundation

Missoula
48 Missoula Community Foundation (formerly known as Celebrate Missoula Community Foundation)
49 Seeley Lake Community Foundation
50 Western Montana Community Foundation

Musselshell
51 Billings Community Foundation
52 Musselshell Valley Community Foundation

Park
53 Park County Community Foundation

Petroleum
54 Petroleum County Endowment

Phillips
55 Phillips County Community Foundation

Pondera
56 Rocky Mountain Front Community Foundation

Powder River
57 Powder River Community Endowment Fund

Powell
58 Powell County Community Foundation
59 Western Montana Community Foundation

Prairie
60 Prairie County Community Foundation

Ravalli
61 Stevensville Community Foundation
62 Three Mile Lone Rock Community Foundation
63 Western Montana Community Foundation

Richland
64 Lambert Community Foundation
65 Richland County Community Foundation

Roosevelt
66 Roosevelt County Community Foundation

Rosebud
67 F.A.I.R. Community Foundation

Sanders
68 Sanders County Community Foundation
69 Western Montana Community Foundation

Sheridan
70 Sheridan County Community Foundation

Silver Bow
71 Butte-Silver Bow Community Foundation

Stillwater
72 Absarokee Community Foundation
73 Billings Community Foundation
74 Columbus Community Foundation
75 Nye Community Foundation

Teton
76 Rocky Mountain Front Community Foundation

Toole
77 Toole County Community Foundation

Treasure
78 Billings Community Foundation

Valley
79 Valley County Community Foundation

Wheatland
80 Judith Gap Endowment

Yellowstone
81 Billings Community Foundation
“In 1995, when Governor Racicot appointed me as Chair of his Task Force on Endowments and Philanthropy, I could count on one hand the number of Montana’s local and county community foundations. Today they number more than 70, with more emerging every month. That says to me that Montanans are serious about the survival of our communities, large and small, and about the legacy we pass on to our children’s children.”

— Susan Talbot, Chair
Governor’s Task Force on
Endowments and Philanthropy
# Table of Contents

Introduction ........................................................................ 1
  An Introduction to Community Foundations
  Why Local Community Foundations?

Why Now ................................................................. 3
  Intergenerational Transfer of Wealth
  Montana Charitable Endowment Tax Credit

Montana Transfer of Wealth ................................................. 4

Gifts to Community Foundations ...................................... 6
  Charitable Funds
  Charitable Instruments
  Types of Charitable Assets

Professional Advisors and Community Foundations .......... 9
  Working Together
  How to Talk with Your Clients

Active Foundations .......................................................... 11

Emerging Foundations .................................................... 37

Dormant Foundations ..................................................... 47

Resources ........................................................................ 52

Sponsors .......................................................................... 53

About Big Sky Institute.................................................... 53
YOU DON'T NEED TO BE A TYCOON TO BE A PHILANTHROPIST
Introduction

The 2008 Guide to Supporting Montana’s Local and County Community Foundations is a tool to help professional advisors meet donors’ desires to benefit the communities that have been an important part of their lives. It includes a map that notes the funds serving each county, a list of funds by county served, alphabetical profiles of active, emerging, and dormant funds, as well as background information useful to advisors.

This guide represents a first effort by the Big Sky Institute for the Advancement of Nonprofits to assemble basic information about local, county, and multi-county foundations and funds dedicated to serving local or regional communities. An intensive effort was made to identify and secure information about local and county community foundations throughout Montana. It is possible that some were missed, and we apologize if that is the case. We encourage readers to notify us about those funds or to update or correct information provided in this guide.

We extend a special thanks to the Montana Community Foundation and the Central Montana Community Foundation for their help in identifying local funds for inclusion in the guide.

An Introduction to Community Foundations

A community foundation is a tax-exempt public charity created by and for the people in a defined geographic area. It enables people with philanthropic interests to easily and effectively support the issues they care about—immediately, or through their estates.

Community foundations are more than a collection of funds. They serve a vital role as catalysts and supporters of good works by bringing together people from across the different sectors of the community to address social and regional challenges. They also support activities that have the most positive benefit to the local community while serving the interests of donors. Some donors specify how their endowments will be used, but “unrestricted” endowments allow earnings to be used to address emerging opportunities and unforeseen needs in the distant future.

The Council on Foundations has identified six characteristics that define a community foundation:

- A flexible, yet permanent collection of funds supported by a wide range of donors
- The relative independence to determine the best use of those funds to meet the community needs
- A governing board of volunteers, knowledgeable about their community and recognized for their personal involvement in civic affairs
- A commitment to provide leadership on pervasive community problems
- A commitment to assist donors to identify and attain their philanthropic goals
- Adherence to a sense of community that overrides individual interests and objectives

Why Local Community Foundations?

Community foundations are an attractive option for donors for several reasons:

- Lifetime gifts of certain kinds of appreciated property, such as real estate and interests in closely-held businesses, can be deducted at full fair-market value.
- The annual deduction limit for individual gifts is higher for a community foundation gift than for a gift to a private foundation.
- Community foundations are free from excise tax and other requirements that apply to private foundations.

Community foundations offer the unique advantage of being able to treat multiple trusts and corporations as part of a single institution rather than as separate organizations. (Each sub-entity is known as a component fund.) Pooling of funds provides economy of scale and reduced aggregate costs for investment, financial reporting, and grant administration. For example, a community foundation with hundreds of different component funds files only one tax return.

Community foundations provide a simple, powerful, and highly personal approach to giving. They offer a variety of giving tools to help people achieve their charitable goals—and create lasting good work in their communities.

In Montana, there are community foundations in nearly every county. Local boards, familiar with local needs, decide where distributable earnings and pass-through dollars will be granted. That’s how we like to do charitable giving in Montana.
ANYBODY CAN BE A PHILANTHROPIST.

YOU JUST NEED TO CARE ABOUT PRESERVING AND IMPROVING YOUR LOCAL WAY OF LIFE.
Why Now?

The opportunities and incentives for supporting Montana’s community foundations have never been greater than they are today thanks to the confluence of the greatest intergenerational transfer of wealth in history and the Montana Charitable Endowment Tax Credit.

Intergenerational Transfer of Wealth

The United States is in the midst of the largest intergenerational transfer of wealth in the nation’s history. Over the next 50 years, an estimated $40 to $160 trillion will pass from older to younger generations.

Montana could see an opportunity to build local community foundation assets by more than $440 million over the next ten years.

Pioneering work by other rural states is helping point the way to how Montana can use the transfer of wealth to build a substantial philanthropic resource for our state for generations to come. Nebraska in particular has made exemplary progress using the intergenerational transfer of wealth to engage residents in thoughtful conversations about the future of their communities and the concept of leaving a philanthropic legacy for those communities through a will or bequest. With extraordinary leadership from the Nebraska Community Foundation and other organizations, Nebraska has set an ambitious goal of capturing five percent of the transfer for the endowments of local community foundations across the state. And it’s working.

The Montana Community Foundation commissioned a Transfer of Wealth Study for Montana, and the preliminary findings are attention-getting. The study estimates a transfer of about $62 billion in Montana over the next 50 years, with nearly nine billion dollars transferring within the decade.

If Montana can be as successful as our friends in Nebraska, this could mean an opportunity to build local community foundation assets by more than $440 million over the next ten years—enough to fund at least 200 organizations at $100,000 per year in perpetuity.

Montana Charitable Endowment Tax Credit

After near unanimous passage in the 2007 Legislature, Governor Schweitzer signed into law an extension until 2013 of Montana’s Charitable Endowment Tax Credit (SB 150). The new law maintains current credit levels for both individuals and corporations. In addition, the bill revises the definition of “permanent, irrevocable fund” to exclude contributions that are “expended directly for constructing, renovating, or purchasing operational assets, such as buildings or equipment.”

The revised credit continues to provide substantial credits against Montana income tax for certain planned and outright gifts to qualified endowments.

Planned Gifts

Credit against state income tax liability in the amount of 40 percent of the present value of any planned gift to a permanent endowment of a Montana charity up to a maximum amount of $10,000 per year per taxpayer. ( Applies to individual or business entity taxpayers.)

Outright Gifts

Credit against state income tax liability in the amount of 20 percent of the present value of any outright gift by a business entity to a permanent endowment of a Montana charity up to a maximum amount of $10,000 per year per taxpayer. ( Applies to corporations, small business corporations, partnerships or limited liability company taxpayers.)

For detailed information about legislation governing Montana’s Endowment Tax Credit visit the following sections of Montana Code Annotated:

- Definition of a Planned Gift 15-30-165(1) MCA
- Definition of a Qualified Endowment 15-30-165(2) MCA
- Defining the Tax Credit for Planned Gifts 15-30-166 MCA
- Defining the Tax Credit for Outright Gifts by Business Entities 15-31-161 MCA and 15-31-162 MCA
- Charitable Gift Annuity Exemption Act 33-20-701 through 705 MCA
## Montana Transfer of Wealth

Estimated Ten-Year Transfer, Capture, and Payout by County

<table>
<thead>
<tr>
<th>County</th>
<th>Current Net Worth 2005 ($ Billions)</th>
<th>10-Year Transfer of Wealth ($ Billions)</th>
<th>5% Captured ($ Millions)</th>
<th>5% Payout ($ Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beaverhead</td>
<td>$0.39</td>
<td>$0.09</td>
<td>$4.50</td>
<td>$0.23</td>
</tr>
<tr>
<td>Big Horn</td>
<td>$0.34</td>
<td>$0.07</td>
<td>$3.50</td>
<td>$0.18</td>
</tr>
<tr>
<td>Blaine</td>
<td>$0.23</td>
<td>$0.04</td>
<td>$2.00</td>
<td>$0.10</td>
</tr>
<tr>
<td>Broadwater</td>
<td>$0.19</td>
<td>$0.04</td>
<td>$2.00</td>
<td>$0.10</td>
</tr>
<tr>
<td>Carbon</td>
<td>$0.50</td>
<td>$0.11</td>
<td>$5.50</td>
<td>$0.28</td>
</tr>
<tr>
<td>Carter</td>
<td>$0.07</td>
<td>$0.01</td>
<td>$0.50</td>
<td>$0.03</td>
</tr>
<tr>
<td>Cascade</td>
<td>$3.26</td>
<td>$0.72</td>
<td>$36.00</td>
<td>$1.80</td>
</tr>
<tr>
<td>Chouteau</td>
<td>$0.25</td>
<td>$0.04</td>
<td>$2.00</td>
<td>$0.10</td>
</tr>
<tr>
<td>Custer</td>
<td>$0.46</td>
<td>$0.09</td>
<td>$4.50</td>
<td>$0.23</td>
</tr>
<tr>
<td>Daniels</td>
<td>$0.10</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Dawson</td>
<td>$0.33</td>
<td>$0.07</td>
<td>$3.50</td>
<td>$0.18</td>
</tr>
<tr>
<td>Deer Lodge</td>
<td>$0.33</td>
<td>$0.07</td>
<td>$3.50</td>
<td>$0.18</td>
</tr>
<tr>
<td>Fallon</td>
<td>$0.11</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Fergus</td>
<td>$0.50</td>
<td>$0.10</td>
<td>$5.00</td>
<td>$0.25</td>
</tr>
<tr>
<td>Flathead</td>
<td>$3.84</td>
<td>$0.90</td>
<td>$45.00</td>
<td>$2.25</td>
</tr>
<tr>
<td>Gallatin</td>
<td>$3.58</td>
<td>$0.92</td>
<td>$46.00</td>
<td>$2.30</td>
</tr>
<tr>
<td>Garfield</td>
<td>$0.09</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Glacier</td>
<td>$0.34</td>
<td>$0.07</td>
<td>$3.50</td>
<td>$0.18</td>
</tr>
<tr>
<td>Golden Valley</td>
<td>$0.05</td>
<td>$0.01</td>
<td>$0.50</td>
<td>$0.03</td>
</tr>
<tr>
<td>Granite</td>
<td>$0.14</td>
<td>$0.04</td>
<td>$2.00</td>
<td>$0.10</td>
</tr>
<tr>
<td>Hill</td>
<td>$0.64</td>
<td>$0.13</td>
<td>$6.50</td>
<td>$0.33</td>
</tr>
<tr>
<td>Jefferson</td>
<td>$0.44</td>
<td>$0.11</td>
<td>$5.50</td>
<td>$0.28</td>
</tr>
<tr>
<td>Judith Basin</td>
<td>$0.10</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Lake</td>
<td>$1.14</td>
<td>$0.26</td>
<td>$13.00</td>
<td>$0.65</td>
</tr>
<tr>
<td>Lewis and Clark</td>
<td>$2.53</td>
<td>$0.57</td>
<td>$28.50</td>
<td>$1.43</td>
</tr>
<tr>
<td>Liberty</td>
<td>$0.10</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Lincoln</td>
<td>$0.72</td>
<td>$0.17</td>
<td>$8.50</td>
<td>$0.43</td>
</tr>
<tr>
<td>Madison</td>
<td>$0.45</td>
<td>$0.10</td>
<td>$5.00</td>
<td>$0.25</td>
</tr>
<tr>
<td>McCone</td>
<td>$0.09</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>County</td>
<td>Current Net Worth 2005 ($ Billions)</td>
<td>10-Year Transfer of Wealth ($ Billions)</td>
<td>5% Captured ($ Millions)</td>
<td>5% Payout ($ Millions)</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------</td>
<td>----------------------------------------</td>
<td>--------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Meagher</td>
<td>$0.10</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Mineral</td>
<td>$0.15</td>
<td>$0.03</td>
<td>$1.50</td>
<td>$0.08</td>
</tr>
<tr>
<td>Missoula</td>
<td>$4.30</td>
<td>$0.96</td>
<td>$48.00</td>
<td>$2.40</td>
</tr>
<tr>
<td>Musselshell</td>
<td>$0.18</td>
<td>$0.04</td>
<td>$2.00</td>
<td>$0.10</td>
</tr>
<tr>
<td>Park</td>
<td>$0.74</td>
<td>$0.15</td>
<td>$7.50</td>
<td>$0.38</td>
</tr>
<tr>
<td>Petroleum</td>
<td>$0.03</td>
<td>$0.01</td>
<td>$0.35</td>
<td>$0.02</td>
</tr>
<tr>
<td>Phillips</td>
<td>$0.19</td>
<td>$0.03</td>
<td>$1.50</td>
<td>$0.08</td>
</tr>
<tr>
<td>Pondera</td>
<td>$0.25</td>
<td>$0.06</td>
<td>$3.00</td>
<td>$0.15</td>
</tr>
<tr>
<td>Powder River</td>
<td>$0.09</td>
<td>$0.02</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Powell</td>
<td>$0.22</td>
<td>$0.05</td>
<td>$2.50</td>
<td>$0.13</td>
</tr>
<tr>
<td>Prairie</td>
<td>$0.06</td>
<td>$0.01</td>
<td>$0.50</td>
<td>$0.03</td>
</tr>
<tr>
<td>Ravalli</td>
<td>$1.77</td>
<td>$0.42</td>
<td>$21.00</td>
<td>$1.05</td>
</tr>
<tr>
<td>Richland</td>
<td>$0.35</td>
<td>$0.07</td>
<td>$3.50</td>
<td>$0.18</td>
</tr>
<tr>
<td>Roosevelt</td>
<td>$0.29</td>
<td>$0.06</td>
<td>$3.00</td>
<td>$0.15</td>
</tr>
<tr>
<td>Rosebud</td>
<td>$0.31</td>
<td>$0.06</td>
<td>$3.00</td>
<td>$0.15</td>
</tr>
<tr>
<td>Sanders</td>
<td>$0.44</td>
<td>$0.11</td>
<td>$5.50</td>
<td>$0.28</td>
</tr>
<tr>
<td>Sheridan</td>
<td>$0.17</td>
<td>$0.03</td>
<td>$1.50</td>
<td>$0.08</td>
</tr>
<tr>
<td>Silver Bow</td>
<td>$1.27</td>
<td>$0.26</td>
<td>$13.00</td>
<td>$0.65</td>
</tr>
<tr>
<td>Stillwater</td>
<td>$0.38</td>
<td>$0.08</td>
<td>$4.00</td>
<td>$0.20</td>
</tr>
<tr>
<td>Sweet Grass</td>
<td>$0.20</td>
<td>$0.04</td>
<td>$2.00</td>
<td>$0.10</td>
</tr>
<tr>
<td>Teton</td>
<td>$0.28</td>
<td>$0.07</td>
<td>$3.50</td>
<td>$0.18</td>
</tr>
<tr>
<td>Toole</td>
<td>$0.20</td>
<td>$0.04</td>
<td>$2.00</td>
<td>$0.10</td>
</tr>
<tr>
<td>Treasure</td>
<td>$0.04</td>
<td>$0.01</td>
<td>$0.20</td>
<td>$0.01</td>
</tr>
<tr>
<td>Valley</td>
<td>$0.32</td>
<td>$0.06</td>
<td>$3.00</td>
<td>$0.15</td>
</tr>
<tr>
<td>Wheatland</td>
<td>$0.09</td>
<td>$0.15</td>
<td>$1.00</td>
<td>$0.05</td>
</tr>
<tr>
<td>Wibaux</td>
<td>$0.04</td>
<td>$0.01</td>
<td>$0.30</td>
<td>$0.02</td>
</tr>
<tr>
<td>Yellowstone</td>
<td>$5.68</td>
<td>$1.28</td>
<td>$64.00</td>
<td>$3.20</td>
</tr>
<tr>
<td><strong>Montana Total</strong></td>
<td><strong>$39.45</strong></td>
<td><strong>$8.84</strong></td>
<td><strong>$441.85</strong></td>
<td><strong>$22.09</strong></td>
</tr>
</tbody>
</table>
Gifts to Community Foundations

As a professional advisor, you have clients who care about philanthropy. Many of your clients may already be donating regularly to the organizations and programs they care about. For most people, attachment to community is similar to attachment to certain charitable organizations. Whether it is a town, a valley, or the entire state of Montana, people define community differently. But most people desire to leave part of their wealth to the communities that helped raise them, educate them, shape their values and embrace them.

Donors who want to ensure that their gifts will do the most good in the community and support organizations over the long term find that community foundations offer them the expertise, flexibility and financial resources to give more to the community while gaining the maximum tax advantages for each contribution. Some donors also prefer to be shielded from fundraisers by giving through the auspices of a community foundation.

Donors can establish a charitable fund at the foundation by contributing a variety of assets and may also recommend grants — in their name, if they choose — to nonprofit groups they want to support.

Charitable Funds

A variety of charitable funds within community foundations provides great giving options. Identify the one that’s right for your donor. (Not every community foundation offers every type of fund.)

Unrestricted Funds
Meeting ever-changing community needs
Most local community foundations have an Unrestricted Fund. When donors contribute to it, their gift is pooled with others to address a broad range of local needs—including future needs that often cannot be anticipated at the time the gift is made. Community foundations evaluate all aspects of community well-being: arts and culture, economic development, education, environment, health and human services, neighborhood revitalization, and more. The flexibility of the unrestricted gift enables the community foundation’s program experts to respond to the community’s most pressing needs, today and tomorrow.

Donor Advised Funds
A personal approach to giving
Establishing a Donor Advised Fund allows the donor to make a gift to the community foundation, then remain actively involved in suggesting uses for the gift. The donor can work with the community foundation to suggest ongoing uses for the fund—targeting the issues they care about most. Grant awards are issued to charities in the name of the fund (or anonymously if the donor prefers). It’s a simple, powerful, and highly personal approach to giving. There is usually a minimum gift level required to establish such a fund.

Field of Interest Funds
Connecting personal values to high-impact opportunities
By establishing a Field of Interest Fund, donors can target gifts to address needs in an important area of community life such as arts, aging, education, or youth. Donors identify a personal interest area when making the gift; the community foundation board awards grants to community organizations and programs that are making a difference in the area selected. The gift stays flexible enough to meet community needs in the interest area — even as they change over time.

Scholarship Funds
Investing in deserving students
By creating a Scholarship Fund, donors invest in the community’s future and show students they care. The community foundation provides the expertise to help donors meet their personal goals and awards scholarships to deserving students. Their gifts can help students achieve their lifetime dreams.

Designated Funds
Helping local organizations sustain and grow
Establishing a Designated Fund allows donors to support the good work of a specific nonprofit organization—a senior center, museum, or virtually any nonprofit charitable organization. Because it is given through the community foundation, the gift provides the selected organization not only funding, but also planned giving and investment management services and the power of endowment.
Supporting Organizations
High impact, high involvement, low hassle
A Supporting Organization is an excellent alternative to a private foundation—with only a fraction of the administrative responsibilities. The donor selects some of the board members, maintains personal involvement, and supports preferred causes while enjoying the favorable tax treatment of a public charity. The community foundation handles management, start-up costs, grant administration, and reporting.

Charitable Instruments
A variety of giving methods can be tailored to the donor’s unique situation. Here are some commonly used instruments:

Outright Gift
The simplest way to make a big difference
Donors can make a gift of cash, stocks, bonds, real estate or other assets to the community foundation. Most charitable gifts qualify for maximum tax advantages under federal law.

Bequest by Will
A legacy of giving
Including a charitable bequest in a will is a simple way to make a lasting gift to the community. When donors make this gift through the community foundation, it benefits the community forever and becomes a personal legacy of giving.

Charitable Gift Annuity
Income for today, a gift for tomorrow
Giving through a Charitable Gift Annuity allows donors to arrange a generous gift to the community, while providing them a new income source they can count on for the rest of their lives.

Charitable Remainder Trust
Planning for the future
Giving through a Charitable Remainder Trust allows donors to receive income for the rest of their lives, knowing that whatever remains will benefit the community.

Charitable Lead Trust
Giving back to community and loved ones
A Charitable Lead Trust helps donors build a charitable fund with a community foundation during the trust’s term. When the trust terminates, the remaining assets are transferred to the donor or the donor’s heirs, often with significant transfer-tax savings.

Types of Charitable Assets
Donors can make a gift of cash, stocks, bonds, real estate, or other assets to a community foundation. Most charitable gifts qualify for maximum tax advantage under federal law. Here are some common assets. The Resources section tells you where you can find more detailed information.

Gift of Appreciated Stock
Turning stock market gains into community investment
Everybody wins when donors make a gift of appreciated stock to a community foundation. The gains are put to good use. The gift of stock is reinvested in the community, and it qualifies for an immediate tax deduction based on the full market value.

Gift of Life Insurance
Community as beneficiary
Paid-up life insurance provides a simple way for donors to give a significant gift to charity, with tax benefits that they can enjoy during their lifetime.

Gift of Real Estate
A charitable gift unearthed
Making a charitable gift of real estate through a community foundation can help donors turn property gains into community good. The value of real estate may exceed that of any other asset the donor owns. With the help of a community foundation, donors can use property to fulfill their charitable interests and receive financial and tax benefits.

Most people desire to leave part of their wealth to the communities that helped raise them, educate them, shape their values and embrace them.
CANNING RHUBARB IS COMPLICATED.

GIVING TO COMMUNITY FOUNDATIONS IS NOT.
Professional Advisors and Community Foundations

Working Together
Community foundations have earned the trust of thousands of professional advisors throughout the United States. Here’s why:

They work through you.
You stay in control of your client relationships; community foundations help you serve your clients’ charitable giving needs.

They partner with you.
Community foundations provide support, information, and expertise related to charitable giving options.

They help you build stronger relationships.
Studies show that many high net-worth individuals are expecting to talk about giving as they make financial plans with their advisors. They will appreciate the charitable impact and tax advantages you help them achieve by working with a community foundation.

They help you connect across generations.
When you help families establish Donor Advised Funds at their community foundation, you begin an ongoing process of involvement with current and future generations.

How to talk with your clients about charitable planned gifts
If your job involves helping clients grow and conserve their assets, reduce income taxes, or prepare for the uncomplicated transfer of their estates, and you are not talking about charitable planned gifts, then you are missing a great opportunity to benefit your clients and Montana. The combination of Montana’s Charitable Endowment Tax Credit and the current unprecedented intergenerational transfer of wealth creates the perfect environment for your clients to do good while doing well. So why aren’t more people doing it?

Many professionals simply are not experienced with charitable planned gifts or the Endowment Tax Credit, so don’t understand the role that planned gifts can play in accomplishing their clients’ goals. Here is some advice from Montana financial professionals:

1. Do your homework
   • Understand your clients’ financial goals, interests, and current charitable giving.
   • Get familiar with Montana’s Charitable Endowment Tax Credit. Talk with other professionals who have used it. Participate in a workshop or training. Run some practice scenarios to become comfortable with its potential. You don’t have to become an expert, but you should understand the value of the tool.

2. Talk to your clients
Let your clients know that there are powerful tools available for making donations and leveraging gifts. Don’t wait for your clients to raise the subject of charitable gifts—chances are that they are relying on you to bring it up. If you don’t, your clients may think that you have already considered it and determined that it is not right for them. Ask questions, such as:
   • Do you have appreciated assets that are not generating income for retirement?
   • Do you have retirement income streams, such as an IRA, that might exceed your income needs?
   • Have you ever thought about giving back to the community through a philanthropic gift?
   • Would you like to provide resources for future generations in this community?
   • Do you want to help those less fortunate in your community?
   • Would you like to inspire other residents to build a local tradition of philanthropy?

3. Run the numbers
   • Offer to research how your clients might benefit from charitable planned gifts to a local community foundation. You don’t have to be an expert; you just have to know where to find one. The best place to start is with your own professional association and the resource list at the back of this guide. Visit with a professional who is experienced with charitable planned gifts and the Montana Endowment Tax Credit.
   • Prepare charitable giving scenarios using your clients’ actual financial information and goals and the Montana Endowment Tax Credit.
   • Arrange a meeting with your clients to present your findings and recommendations. You may also want to invite your expert advisor until you are comfortable presenting the information yourself.
“One of the least enjoyable parts of my job as a trust officer was when I sent big checks out of state, because I was not certain the donors were fully aware of the opportunities for sharing their resources here in Montana.”

— Steve Polhemus, Vice President and Regional Manager,
First Interstate Wealth Management
The community foundations profiled in this section are established and actively raising funds and distributing grants in their communities.
“Community Foundations in towns and counties across Montana are an incredible asset to our state, both now and for the future. As Chairman of the Senate Finance Committee, I strongly believe community foundations are a crucial part of bridging the rural philanthropic divide. Local community foundations are so important because they are run by Montanans with their feet on the ground—folks familiar with local needs, local resources, and local dreams. Investing in the development of local community foundations turns a one-time gift into a life-long asset for Montana communities.”

— U.S. Senator Max Baucus
**Absarokee Community Foundation**

Established: 2000  
Area Served: Stillwater County

**Contact Information**  
Contact: Greg Mizen  
Address: P.O. Box 72  
Absarokee, MT 59001  
Phone: 406-328-6370  
E-mail: gemusa@earthlink.net

**Legal and Tax Status**  
IRS 501(c)(3): Yes  
EIN #: 73-1658638

Affiliated with the Montana Community Foundation

**Fiscal Information**  
Accounting Cycle/Fiscal Year: 7/1-6/30  
Permanent endowment(s) funds at the close of last fiscal year: $191,082

**Granting Information**  
Year grantmaking began: 2001  
Total amount awarded since inception: $53,000  
Amount awarded in previous year: $16,850

Grant type(s): General Operations, Projects/Programs  
Donor advised funds not available

For donations make checks payable to:  
Montana Community Foundation if permanent endowment (write Absarokee Community Foundation on memo line):

    Montana Community Foundation  
    PO. Box 1145  
    Helena, MT  59624

or Absarokee Community Foundation if to local fund  
Send donations to:

    Absarokee Community Foundation  
    P.O. Box 72  
    Absarokee, MT 59001

---

**Beacon Community Foundation**

Established: 1995  
Area Served: Daniels County

**Contact Information**  
Contact: Jere Lee Gunderson  
Address: P.O. Box 726  
Scobey, MT 59263  
Phone: 406-487-2292  
E-mail: navajo@nemontel.net

**Legal and Tax Status**  
IRS 501(c)(3): Yes  
EIN #: 81-0498333

**Fiscal Information**  
Accounting Cycle/Fiscal Year: 1/1-12/31  
Permanent endowment(s) funds at the close of last fiscal year: $720,000

**Granting Information**  
Year grantmaking began: 1995  
Total amount awarded since inception: $90,000  
Amount awarded in previous year: $11,000

Grant type(s): Projects/Programs  
Donor advised funds available

For donations make checks payable to:  
Beacon Community Foundation

Send donations to:

    Beacon Community Foundation  
    P.O. Box 726  
    Scobey, MT 59263
About the Billings Community Foundation
Billings Community Foundation was founded by the volunteers who formerly constituted the Greater Yellowstone Regional Committee of the Montana Community Foundation (MCF). When MCF discontinued their regions, the Billings Community Foundation created its own 501(c)(3) nonprofit to better respond to the needs of our region. The committee had existed for more than a decade and has a history of grantmaking and fundraising within this region.

Of Interest: Judith Matthews Dousman wanted to leave a gift to her community of Billings. At the time, there was no Billings Community Foundation, so she left money to the Greater Yellowstone Region of the Montana Community Foundation. The Billings Community Foundation is now the beneficiary of the distributable income from that fund to re-grant within our region.

Blackfeet Community Endowment Fund
(aka Blackfeet Reservation Development Fund)

Year Established: 1991
Area Served: Blackfeet Reservation

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 36-3784925
Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $347,220

Granting Information
Year grantmaking began: not yet begun
Total amount awarded since inception: $22,000
Amount awarded in previous year: 0
Granting focus: Education, Basic Human Needs, Arts and Culture, Natural Resources and Conservation, Economic Development, Endowment Building
Grant type(s): Projects/Programs
Donor advised funds available

For donations make checks payable to:
Blackfeet Reservation Development Fund, Inc
Send donations to:
PO. Box 3029
Browning, MT 59417
15

Blaine County Community Foundation

Area Served: Blaine County

Contact Information
Contact: Warren Ross, President
Address: Route 71, Box 17
        Chinook, MT 59523
Phone: 406-357-3593
E-mail: rossrnch@ttc-cmc.net

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $22,910

Granting Information
Year grantmaking began: 2005
Total amount awarded since inception: $2,500
Amount awarded in previous year: 0

Grant type(s): Projects/Programs

Donor advised funds not yet available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Blaine County Community Foundation

Send donations to:
Montana Community Foundation
P.O. Box 1145
Helena, MT 59624

Bozeman Area Community Foundation

Established: 1998
Area Served: Southwest Montana

Contact Information
Contact: Steve Hample, Founder
Address: 300 N. Willson Ave.
        Suite #202B
        Bozeman, MT 59715
Phone: 406-587-6262
Fax: 406-587-1562
E-mail: Steve.Hample@KMSFinancial.com
Website: www.BozemanFoundation.org

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 81-0519514

Fiscal Information
Accounting Cycle/Fiscal Year: 4/1-3/31
Permanent endowment(s) funds at the close of last fiscal year: $600,000

Granting Information
Year grantmaking began: 1999
Total amount awarded since inception: $75,000
Amount awarded in previous year: $12,337

Grant type(s): General Operations

Donor advised funds available

For donations make checks payable to:
Bozeman Area Community Foundation

Send donations to:
    300 N. Willson Ave.
    Suite #202B
    Bozeman, MT 59715
Butte-Silver Bow Community Foundation

Established: 1995
Area Served: Butte-Silver Bow County community

Contact Information
Contact: Margie Thompson, President
Address: P.O. Box 805
Butte, MT 59703
Phone: 406-494-2873
Fax: 406-782-1723
E-mail: margiet41@yahoo.com
Website: www.mtcf.org/butte-silver_bow.html

Legal and Tax Status
IRS 501(c)(3): Pending
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $27,989

Granting Information
Year grantmaking began: 2005
Total amount awarded since inception: $9,500
Amount awarded in previous year: $4,500

Granting focus: Arts, Environment, Economic Development, Education, Health and Human Services
Grant type(s): General Operations and Projects/Programs
Donor advised funds available

For donations make checks payable to: Butte-Silver Bow Community Foundation
Send donations to:
P.O. Box 805
Butte, MT 59703

Of Interest: The foundation started in 1995 through a challenge grant from the Anheuser Busch Corporation. It went dormant for a few years, but recharged in 2005 thanks to a $5,000 contribution from Rhodia that triggered a $5,000 match. Although Rhodia no longer has a corporate presence in Butte, the company continues to support the community through its support of the Foundation.

Broadwater Community Foundation

Established: 1995
Area Served: Broadwater County

Contact Information
Contact: Brian Patrick
Address: 201 North Spruce
Townsend, MT 59644
Phone: 406-266-5512
Fax: 406-266-4957
E-mail: bpatrick@townsend.k12.mt.us
Website: www.mtcf.org/broadwater.html

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 7/1-6/30
Permanent endowment(s) funds at the close of last fiscal year: $287,103

Granting Information
Year grantmaking began: 1996
Total amount awarded since inception: $23,000
Amount awarded in previous year: $8,000

Granting focus: Arts/Culture, Community Services/Facilities, Economic Development, Education, Health/Mental Health, and Human Services
Grant type(s): Projects/Programs
Donor advised funds not yet available

For donations make checks payable to: Montana Community Foundation
Send donations to:
Montana Community Foundation
P.O. Box 1145
Helena, MT 59624

Of Interest: The foundation started in 1995 through a challenge grant from the Anheuser Busch Corporation. It went dormant for a few years, but recharged in 2005 thanks to a $5,000 contribution from Rhodia that triggered a $5,000 match. Although Rhodia no longer has a corporate presence in Butte, the company continues to support the community through its support of the Foundation.
Central Montana Community Foundation

Area Served: Fergus, Garfield, Judith Basin, Petroleum, and Wheatland Counties

Contact Information
Contact: Diane Lutz
Address: P.O. Box 334
        Lewistown, MT 59457
Phone: 406-538-6130
E-mail: sdlutz@midrivers.com

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 81-0425314

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of the last fiscal year: $8,426,456

For donations make checks payable to:
Central Montana Community Foundation

Send donations to:
    P.O. Box 334
    Lewistown, MT 59457

Community Foundation for a Better Bigfork

Established: 1970
Area Served: Bigfork community

Contact Information
Contact: Paul Mutascio
Address: P.O. Box 486
        Bigfork, MT 59911
Phone: 406-837-1442
Fax: 406-837-1510
E-mail: pmutascio@centurytel.net
Website: www.bigforkdevelopmentcompany.com

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 23-7067099

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $43,350

Granting Information
Granting focus: Community development
Grant type(s): Capital and other identified by board

Donor advised funds not available

For donations make checks payable to:
Community Foundation for a Better Bigfork

Send donations to:
    P.O. Box 486
    Bigfork, MT 59911

About the Community Foundation for a Better Bigfork
The Community Foundation for a Better Bigfork invests directly in strategic community development projects that preserve the beauty and uniqueness of Bigfork’s surroundings and assist in its orderly growth and economic development while promoting social, artistic, and education interests for the common good of the community.
F.A.I.R. Community Foundation

Established: 2006
Area Served: Northern Rosebud County
             (Forsyth, Angela, Ingomar, Rosebud)

Contact Information
Contact: Marvin Quinlan, Jr., Fund Representative
Address: P.O. Box 578
         Forsyth, MT 59327
Phone: 406-356-3456 or 406-356-2481
Fax: 406-346-3431

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the
close of last fiscal year: $25,906

Granting Information
Year grantmaking began: 2007
Total amount awarded since inception: $30,000
Amount awarded in previous year: $4,200

Granting focus: Education, Environment, Human Services,
Community Development, Health, Religion
Grant type(s): Projects/Programs. General Operations

Donor advised funds available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
F.A.I.R. Community Foundation

Send donations to:
c/o: Marvin Quinlan, Jr.
   P.O. Box 578
   Forsyth, MT 59327

Of Interest: Melvin H. “Swede” Schlesinger took a lot of
chances during his life and turned many challenges into
opportunities. Shortly after graduating from the University
of Wyoming, he moved to Montana to start his own cattle
ranch outside of Ingomar in Rosebud County. He became

---

Denton Endowment

Established: 1999
Area Served: Denton community

Contact Information
Contact: Wayne Edwards
Address: c/o Farmers State Bank
         Denton, MT 59430
Phone: 406-567-2226
Fax: 406-567-2689
E-mail: wayne_wes@yahoo.com

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the
close of last fiscal year: $24,500

Granting Information
Year grantmaking began: 1999
Total amount awarded since inception: $30,000
Amount awarded in previous year: $4,200

Granting focus: Education, Community Development
Grant type(s): Projects/Programs

Donor advised funds are not available

For donations make checks payable to:
Central Montana Community Foundation

On the memo line write:
Denton Endowment

Send donations to:
   Central Montana Community Foundation
   P.O. Box 334
   Lewistown, MT 59457

---

2008 Guide to Supporting Montana’s Local and County Community Foundations
one of Montana’s leading cattlemen. Upon his death, his heirs conceived a fitting tribute and donated a challenge grant to Swede’s beloved Rosebud County—specifically, a $125,000 challenge grant to start a local community foundation. The family contributed the initial $25,000 to establish the foundation and pledged another $100,000 if the community raises $50,000 in five years. Funds raised by the community also qualify for additional matching money from the Montana Community Foundation.

Flathead Community Foundation

Established: 2005
Area Served: Flathead County

Contact Information
Contact: Nancy Davis, President
Address: P.O. Box 1422
         Kalispell, MT 59903
Phone: 406-758-2800
Fax: 406-758-2805
E-mail: fcfm@centurytel.net

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 20-3153511

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $3,000

Granting Information
Year grantmaking began: 2005
Total amount awarded since inception: $14,500
Amount awarded in previous year: $9,500
Grant type(s): General Operations and Project/Programs

Donor advised funds available

For donations make checks payable to:
Flathead Community Foundation

Send donations to:
Fred Kellogg, Treasurer
P.O. Box 1422
Kalispell, MT 59903

Garfield County Endowment

Area Served: Garfield County

Contact Information
Contact: Holly Harbaugh
Address: Box 395
         Jordan, MT 59337
Phone: 406-557-2692 (wk) 406-557-2324 (h)
Fax: 406-557-2520 (wk)
E-mail: ssh@midrivers.com

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:
Central Montana Community Foundation

On the memo line write:
Garfield County Endowment

Send donations to:
Central Montana Community Foundation
P.O. Box 334
Lewistown, MT 59457
Grass Range Community Foundation

Area Served: Grass Range

Contact Information
Contact: Wayne Eickhoff
Address: P.O. Box 144
        Grass Range, MT 59032
Phone:  406-428-2449
Fax:  406-428-2449

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:
Central Montana Community Foundation

On the memo line write:
Grass Range Community Foundation

Send donations to:
    Central Montana Community Foundation
    P.O. Box 334
    Lewistown, MT 59457

Hill County Community Foundation

Established: 1995
Area Served: Hill County

Contact Information
Contact: Valerie Hanson, Administrator
Address: 520 6th Ave.
        Havre, MT 59501
Phone:  406-265-5072
E-mail:  hcce@havremt.net, valerie-hanson@dvn.com
Website:  www.mtcf.org/hill_county.html

Legal and Tax Status
Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 7/1-6/30
Permanent endowment(s) funds at the close of last fiscal year: $13,495

Granting Information
Year grantmaking began: 2005
Total amount awarded since inception: $2,250
Amount awarded in previous year: 0

Granting focus: Arts/Culture, Human Services, and Beautification
Grant type(s): Projects/Programs

Donor advised funds not yet available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Hill County Community Endowment

Send donations to:
    Montana Community Foundation
    P.O. Box 1145
    Helena, MT 59624
Hobson Endowment

Area Served: Hobson

Contact Information
Contact: Sara Stevenson
Address: P.O. Box 321
Hobson, MT 59452
Phone: 406-423-5443
Fax: 406-423-5443
E-mail: sarajune@stevensonbasin.com

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:
Central Montana Community Foundation

On the memo line write:
Hobson Endowment

Send donations to:
Central Montana Community Foundation
P.O. Box 334
Lewistown, MT 59457

Jefferson Valley Community Foundation

Established: 2001
Area Served: Whitehall School District

Contact Information
Contact: Terri Marx
Address: P.O. Box 675
Whitehall, MT 59759
Phone: 406-287-9166
Fax: 406-287-9951
E-mail: marx@jeffersonvalley.org

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $71,641

Granting Information
Year grantmaking began: 2002
Total amount awarded since inception: $5,000
Amount awarded in previous year: $2,000
Grant type(s): Projects/Programs, Capital
Donor advised funds not available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Jefferson Valley Community Foundation

Send donations to:
Montana Community Foundation
P.O. Box 1145
Helena, MT 59624

About the Jefferson Valley Community Foundation
Jefferson Valley Community Foundation was inspired and encouraged by the Broadwater Community Foundation, which provides a model for rural community engagement.
Joliet Community Foundation

Established: 1999
Area Served: Greater Joliet area

Contact Information
Contact: Lisa Gruber
Address: 10066 US Hiway 212
Joliet, MT 59041
Phone: 406-962-3249
E-mail: lisagruber@qwest.net
Website: www.mtcf.org/joliet.html

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $34,123

Granting Information
Year grantmaking began: 2004
Total amount awarded since inception: $6,050
Amount awarded in previous year: $4,500

Granting focus: Community Development
Grant type(s): Projects/Programs, Capital

Donor advised funds not yet available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Joliet Community Foundation

Send donations to:
c/o: Lisa Gruber
10066 US Hwy 212
Joliet, MT 59041

Judith Basin County/Stanford Endowment

Area Served: Judith Basin County

Contact Information
Contact: G.C. Tucker Hughes
Address: P.O. Box 194
Stanford, MT 59479
Phone: 406-566-2619
E-mail: thughes@mtintouch.net

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:
Central Montana Community Foundation

On the memo line write:
Judith Basin County/Stanford Endowment

Send donations to:
Central Montana Community Foundation
P.O. Box 334
Lewistown, MT 59457
Lewis & Clark County Community Foundation

Established: 1994  
Area Served: Lewis and Clark County

Contact Information
Contact: Judi Johnston, Foundation Administrator  
Address: P.O. Box 1615  
Helena, MT 59624  
Phone: 406-443-5860  
E-mail: lccf@bigskyinstitute.org  
Website: www.lccfoundation.org

Legal and Tax Status
IRS 501(c)(3): Yes  
EIN #: 81-0536902

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1- 12/31  
Permanent endowment(s) funds at the close of last fiscal year: $265,907

Granting Information
Year grantmaking began: 1999  
Total amount awarded since inception: $47,500  
Amount awarded in previous year: $12,000

Grant type(s): Capital, General Operations, and Projects/Programs

Donor advised funds available

For donations make checks payable to:  
Lewis & Clark Community Foundation

Send donations to:  
P.O. Box 1615  
Helena, MT 59624

Judith Gap Endowment

Area Served: Judith Gap

Contact Information
Contact: Dean Peterson  
Address: Judith Gap, MT, 59453  
Phone: 406-374-2244

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:  
Central Montana Community Foundation

On the memo line write:  
Judith Gap Endowment

Send donations to:  
Central Montana Community Foundation  
P.O. Box 334  
Lewistown, MT 59457
<table>
<thead>
<tr>
<th>Lincoln County Community Foundation</th>
<th>Lower Flathead Valley Community Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area Served: South Lincoln County</td>
<td>Area Served: Southern Lake County</td>
</tr>
<tr>
<td><strong>Contact Information</strong></td>
<td><strong>Contact Information</strong></td>
</tr>
<tr>
<td>Contact: Paula Darko-Hensler</td>
<td>Contact: Rod Johnson, Treasurer or</td>
</tr>
<tr>
<td>Address: P.O. Box 490</td>
<td>Carlene Bockman, Secretary</td>
</tr>
<tr>
<td></td>
<td>Address: P.O. Box 255</td>
</tr>
<tr>
<td></td>
<td>Libby, MT 59923</td>
</tr>
<tr>
<td></td>
<td>Phone: 406-293-4838</td>
</tr>
<tr>
<td></td>
<td>E-mail: <a href="mailto:hensler@frontiernet.net">hensler@frontiernet.net</a></td>
</tr>
<tr>
<td><strong>Legal and Tax Status</strong></td>
<td><strong>Legal and Tax Status</strong></td>
</tr>
<tr>
<td>IRS 501(c)(3): No</td>
<td>IRS 501(c)(3): Yes</td>
</tr>
<tr>
<td>Fiscal Sponsor: Montana Community Foundation</td>
<td>EIN #: 81-0516003</td>
</tr>
<tr>
<td>EIN #: 81-0450150</td>
<td><strong>Fiscal Information</strong></td>
</tr>
<tr>
<td></td>
<td>Accounting Cycle/Fiscal Year: 1/1-12/31</td>
</tr>
<tr>
<td></td>
<td>Permanent endowment(s) funds at the</td>
</tr>
<tr>
<td></td>
<td>close of last fiscal year: $199,217</td>
</tr>
<tr>
<td><strong>Granting Information</strong></td>
<td><strong>Granting Information</strong></td>
</tr>
<tr>
<td>Year grantmaking began: 1995</td>
<td>Year grantmaking began: 1998</td>
</tr>
<tr>
<td>Total amount awarded since inception: $12,000</td>
<td>Total amount awarded since inception: $361,025</td>
</tr>
<tr>
<td>Amount awarded in previous year: $2,500</td>
<td>Amount awarded in previous year: $27,500</td>
</tr>
<tr>
<td>Grant type(s): Projects/Programs</td>
<td>Grant type(s): Projects/Programs</td>
</tr>
<tr>
<td>Donor advised funds not yet available</td>
<td>Donor advised funds available</td>
</tr>
<tr>
<td><strong>For donations make checks payable to:</strong></td>
<td><strong>For donations make checks payable to:</strong></td>
</tr>
<tr>
<td>Montana Community Foundation</td>
<td>Lower Flathead Valley Community Foundation</td>
</tr>
<tr>
<td></td>
<td>Send donations to:</td>
</tr>
<tr>
<td>On the memo line write:</td>
<td>P.O. Box 255</td>
</tr>
<tr>
<td>Lincoln County Community Foundation</td>
<td>Ronan, MT 59864</td>
</tr>
<tr>
<td></td>
<td>Send donations to:</td>
</tr>
<tr>
<td></td>
<td>Montana Community Foundation</td>
</tr>
<tr>
<td></td>
<td>P.O. Box 1145</td>
</tr>
<tr>
<td></td>
<td>Helena, MT 59624</td>
</tr>
</tbody>
</table>
Mineral County Community Foundation

Established: 1994  
Area Served: Mineral County

Contact Information  
Contact: Jim Goss, Treasurer  
Address: P.O. Box 93  
Superior, MT 59872  
Phone: 406-822-5000  
Fax: 406-822-5000  
E-mail: jgossorcreich@blackfoot.net

Legal and Tax Status  
IRS 501(c)(3): Yes  
EIN #: 81-0501990

Affiliated with the Montana Community Foundation

Fiscal Information  
Accounting Cycle/Fiscal Year: 1/1-12/31  
Permanent endowment(s) funds at the close of last fiscal year: $141,287

Granting Information  
Year grantmaking began: 2006  
Total amount awarded since inception: $4,000  
Amount awarded in previous year: $4,000

Granting focus: Arts, Education, Environment, Youth  
Grant type(s): Projects/Programs and General Operations

Donor advised funds not yet available

For donations make checks payable to:  
Mineral County Community Foundation

Send donations to:  
P.O. Box 93  
Superior, MT 59872

Missoula Community Foundation

Established: 2002  
Area Served: Missoula County

Contact Information  
Contact: Dale Woolhiser  
Address: P.O. Box 1968  
Missoula, MT 59806  
Phone: 406-829-2445  
E-mail: dale_woolhiser@ml.com

Legal and Tax Status  
IRS 501(c)(3): Yes  
EIN #: 81-0332424

Affiliated with the Montana Community Foundation

Fiscal Information  
Accounting Cycle/Fiscal Year: 1/1-12/31  
Permanent endowment(s) funds at the close of last fiscal year: $35,200

Granting Information  
Year grantmaking began: 2002  
Total amount awarded since inception: $50,000  
Amount awarded in previous year: $7,500

Granting focus: Missoula area projects and programs for Arts/Culture, Education, Human Services, Community Services/Facilities, Environment/Animal Related, Neighborhood Assistance, and Health/Mental Health

Donor advised funds not yet available

For donations make checks payable to:  
Missoula Community Foundation

Send donations to:  
P.O. Box 8615  
Missoula, MT 59807
Moore Endowment

Area Served: Moore

Contact Information
Contact: Gary Greenwood
Address: P.O. Box 133
        Moore, MT 59464
Phone:  406-374-2363

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:
Central Montana Community Foundation

On the memo line write:
Moore Endowment

Send donations to:
    Central Montana Community Foundation
    P.O. Box 334
    Lewistown, MT 59457

Musselshell Valley Community Foundation

Established:  1997
Area Served: Musselshell Valley

Contact Information
Contact: Alice Wolff
Address: P.O. Box 713
        Roundup, MT 59072
Phone:  406-323-1771
E-mail:  info@mvcf.info
Website:  www.mvcf.info

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 81-0512493

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $39,501

Granting Information
Year grantmaking began: 2001
Total amount awarded since inception: $4,000
Amount awarded in previous year: $1,000

Granting focus: Community Enhancement, Recreational and Cultural Development, Youth Activities, Natural Resources, and Community Education
Grant type(s): Projects/Programs

Donor advised funds available

For donations make checks payable to:
Musselshell Valley Community Foundation

Send donations to:
    P.O. Box 713
    Roundup, MT 59072
Nye Community Foundation

Established: 1999
Area Served: Nye and Absarokee communities

Contact Information
Contact: Penny Keogh, Treasurer
Address: P.O. Box 528
Nye, MT 59061
Phone: 406-328-6285
Website: www.nye-foundation.us

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 81-0531083

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 7/1-6/30
Permanent endowment(s) funds at the close of last fiscal year: $67,908

Granting Information
Year grantmaking began: 1999
Total amount awarded since inception: $18,740
Amount awarded in previous year: $5,300

Grant type(s): General Operations and Projects/Programs

Donor advised funds available

For donations make checks payable to:
Nye Community Foundation

Send donations to:
P.O. Box 528
Nye, MT 59061

Park County Community Foundation

Established: 2005
Area Served: Park County

Contact Information
Contact: Michael Goodman, Executive Director
Address: P.O. Box 2199
Livingston, MT 59047
Phone: 406-222-9103
E-mail: mgoodman@pccf-montana.org
Website: www.pccf-montana.org

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 20-5581763

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $0

Granting Information
Year grantmaking began: 2007
Total amount awarded since inception: $20,000
Amount awarded in previous year: $0

Granting focus: All nonprofit and public entities
Grant type(s): Projects/Programs, Operating Funds, Capital

Donor advised funds available: No

For donations make checks payable to:
Park County Community Foundation

Send donations to:
P.O. Box 2199
Livingston, MT 59047

The Park County Community Foundation’s mission is to foster collaborative community action to shape a healthy, vital, and caring community. To accomplish this, PCCF develops, marshals, and leverages resources to efficiently and strategically address community-identified needs. PCCF is committed to helping create a culture of philanthropy throughout the community; advancing the notion that everyone is responsible for the health and vitality of the community and its residents; and creating opportunities for everyone to become actively engaged in strengthening the community.
Phillips County Community Foundation

Established: 1998
Area Served: Phillips County

Contact Information
Contact: Teresa McKeon, Director
or Anne Boothe, Director
Address: Box 275
Malta, MT 59538
Phone: Teresa 406-654-1575 or Anne 406-654-1776
Fax: 406-654-2689
E-mail: teresa@chmspc.com or pccf@mtintouch.net
Website: www.maltachamber.com/foundation.htm

Legal and Tax Status
IRS 501(c)(3): No
Affiliated with the Montana Community Foundation
EIN #: 81-0450150

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $129,204

Granting Information
Year grantmaking began: 2000
Total amount awarded since inception: $11,162
Amount awarded in previous year: $4,216

Granting focus: Arts and Culture, Basic Human Needs, Economic Development, Education, and Natural Resources and Conservation
Grant type(s): Projects/Programs and Scholarships

Donor advised funds available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Phillips County Community Foundation

Send donations to:
Phillips County Community Foundation
P.O. Box 275
Malta, MT 59538

Petroleum County Endowment

Area Served: Petroleum County

Contact Information
Contact: Jim Johnke
Address: Winnett, MT 59087
Phone: 406-429-2311
E-mail: johnke@midrivers.com

Legal and Tax Status
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:
Central Montana Community Foundation

On the memo line write:
Petroleum County Endowment

Send donations to:
Central Montana Community Foundation
P.O. Box 334
Lewistown, MT 59457
**About the Phillips County Community Foundation**

Like many small communities, the Malta area needed a way to save for the future. Our community did not have a strong history of permanent endowments, so the community foundation concept was new. The idea of establishing a permanent endowment to benefit our community for generations was well received and provided an incentive for giving. The Phillips County Community Foundation developed The Phillips County Guide to Giving to provide information about the Foundation, permanent endowments, and all 501(c)(3) nonprofit organizations in the county. The guide has been distributed to local banks, law offices, accounting offices, and other sites. The guide inspired the heir to a local estate to establish the Gena Larson Food Bank endowment fund.

**Of Interest**

Ross and Doris Robinson, a Phillips County couple with ancestors among the area’s early residents, contributed generously to begin the Foundation’s donor advised funds.

Community grant funds were provided to initiate a new program, Leadership Phillips County. The program, sponsored by the local economic development organization, identifies leaders (and potential leaders) in business, government, and the community and helps them expand their skills, knowledge, and commitment to the community. The program provides an in-depth opportunity for participants to understand issues facing Phillips County and the region and connects participants with community leaders.

---

**Powder River Community Endowment Fund**

Established: 1995  
Area Served: Greater Powder River area

**Contact Information**

Contact: Christine Franklin, Executive Director  
Address: P.O. Box 421  
Broadus, MT 59317  
Phone: 406-436-2009  
Fax: 406-436-2009  
E-mail: franklinfam@rangeweb.net or pipelinesplus@rangeweb.net  
Website: www.broadus.net

**Legal and Tax Status**

IRS 501(c)(3): Yes  
EIN #: 81-0514945

Affiliated with the Montana Community Foundation

**Fiscal Information**

Accounting Cycle/Fiscal Year: 1/1-12/31  
Permanent endowment(s) funds at the close of last fiscal year: $100,878

**Granting Information**

Year grantmaking began: 1996  
Total amount awarded since inception: $29,390  
Amount awarded in previous year: $3,349

Granting focus: Rural vitality, quality of life  
Grant type(s): Projects/Programs

Donor advised funds available

**For donations make checks payable to:**  
PRCEF

Send donations to:  
c/o: Christine Franklin  
P.O. Box 421  
Broadus, MT 59317
**Powell County Community Foundation**

Established: 1999  
Area Served: Powell County

**Contact Information**
Contact: Steve Owens, Secretary  
Address: P.O. Box 834  
Deer Lodge, MT 59722  
Phone: 406-846-3413  
Fax: 406-846-2622  
E-mail: Sowens48@hotmail.com  
Website: www.mtcf.org/powell.html

**Legal and Tax Status**
IRS 501(c)(3): No  
Fiscal Sponsor: Montana Community Foundation  
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

**Fiscal Information**
Accounting Cycle/Fiscal Year: 7/1-6/30  
Permanent endowment(s) funds at the close of last fiscal year: $92,803

**Granting Information**
Year grantmaking began: 2000  
Total amount awarded since inception: $43,200  
Amount awarded in previous year: $10,300

Granting focus: Education, culture, recreation, and human services  
Grant type(s): Capital, General Operations, and Projects/Programs

Donor advised funds available: No

**For donations make checks payable to:**  
Montana Community Foundation

On the memo line write:  
Powell County Community Foundation

**Send donations to:**  
Montana Community Foundation  
P.O. Box 1145  
Helena, MT 59624

---

**Red Lodge Area Community Foundation**

Established: 2003  
Area Served: Red Lodge area

**Contact Information**
Contact: Jo Ann Eder, President  
Address: P.O. Box 1871  
Red Lodge, MT 59068  
Phone: 406-446-1867 or 406-690-9940  
E-mail: rlacf@yahoo.com or grtblsfire@aol.com  
Website: www.redlodgeareacommunityfoundation.org

**Legal and Tax Status**
IRS 501(c)(3): Yes  
EIN #: 20-0192255  
Affiliated with the Montana Community Foundation

**Fiscal Information**
Accounting Cycle/Fiscal Year: 1/1-12/31  
Permanent endowment(s) funds at the close of last fiscal year: $39,745

**Granting Information**
Year grantmaking began: 2006

**For donations make checks payable to:**  
Red Lodge Area Community Foundation

Send donations to:  
c/o: Jo Ann Eder  
P.O. Box 1871  
Red Lodge, MT 59068

**About the Red Lodge Area Community Foundation**
In 1992, local residents recognized that increasing growth in Red Lodge and surrounding areas could change the qualities that make the community a unique and desirable place to live. They formed the Beartooth Front Community Forum to give thoughtful consideration to a variety of issues. In 2000, the Forum created an endowment fund, the Beartooth Front Community Foundation, later named the Red Lodge Area Community Foundation, to provide a permanent and growing source of funds for community needs and initiatives. The Foundation was originally organized as part of the Montana Community Foundation. In 2003 the Red Lodge Area Community Foundation filed for 501(c)(3) status to create its own entity separate from the Beartooth Community Forum, allowing it to better serve the community of Red Lodge and the local area.
Roberts Community Foundation

Established: 1996
Area Served: Roberts community

Contact Information
Contact: Elta B. Ayre, Chair
Address: P.O. Box 284
        Roberts, MT 59070
Phone: 406-445-2722
Fax: 406-445-2506
E-mail: mandeayre@hotmail.com

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 84-1425182

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $45,269

Granting Information
Year grantmaking began: 1997
Total amount awarded since inception: $150,000
Amount awarded in previous year: $13,000

Granting focus: Community Services/Facilities, Economic Development, Education, and Human Services
Grant type(s): Projects/Programs

Donor advised funds not available

For donations make checks payable to:
Roberts Community Foundation
Send donations to:
    P.O. Box 284
    Roberts, MT 59070

---

Rocky Mountain Front Community Foundation

(formerly known as Teton County Community Foundation)

Established: 1999
Area Served: Teton County

Contact Information
Contact: Corlene Martin, Community Coordinator
Address: P.O. Box 1188
        Choteau, MT 59422
Phone: 406-466-5784
E-mail: corlene@3rivers.net
Website: www.mtcf.org/rocky_mtn_front.html

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Teton County Development Corp
EIN #: 81-0475804

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $20,020

Granting Information
Year grantmaking began: 2006
Total amount awarded since inception: $4,800
Amount awarded in previous year: $4,800

Granting focus: Environment, Arts, Community Development
Grant type(s): Projects/Programs

Donor advised funds available

For donations make checks payable to:
Teton County Development Corp.
Send donations to:
    P.O. Box 1188
    Choteau, MT 59422

---
Roosevelt County Community Foundation

Established: 1998  
Area Served: Roosevelt County

Contact Information  
Contact: Karen Jeide, Secretary/Treasurer  
Address: 200 Hwy 2 East  
Wolf Point, MT 59201  
Phone: 406-653-1951  
Fax: 406-653-1266  
E-mail: karenj@chmspc.com

Legal and Tax Status  
IRS 501(c)(3): No  
Fiscal Sponsor: Montana Community Foundation  
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information  
Accounting Cycle/Fiscal Year: 1/1-12/31  
Permanent endowment(s) funds at the close of last fiscal year: $42,197

Granting Information  
Year grantmaking began: 2001  
Total amount awarded since inception: $8,194  
Amount awarded in previous year: $2,294

Grant type(s): Projects/Programs

Donor advised funds not available

For donations make checks payable to:  
Montana Community Foundation

On the memo line write:  
Roosevelt County Community Foundation

Send donations to:  
Roosevelt County Community Foundation  
200 Hwy 2 East  
Wolf Point, MT 59201

Roy Endowment

Area Served: Roy

Contact Information  
Contact: Shelly Willmore  
Address: River Route  
Roy, MT 59471  
Phone: 406-464-7411

Legal and Tax Status  
Affiliated with the Central Montana Community Foundation

For donations make checks payable to:  
Central Montana Community Foundation

On the memo line write:  
Roy Endowment

Send donations to:  
Central Montana Community Foundation  
P.O. Box 334  
Lewistown, MT 59457
Seeley Lake Community Foundation

Established: 1999
Area Served: Seeley Lake School District

Contact Information
Contact: Stan Nicholson, Secretary
Address: P.O. Box 25
Seeley Lake, MT 59868
Phone: 406-677-2517
E-mail: snicholson@blackfoot.net
Website: www.mtcf.org/seeley_lake.html

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 31-1711576

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $230,918

Granting Information
Year grantmaking began: 2003
Total amount awarded since inception: $85,000
Amount awarded in previous year: $27,500

Grant type(s): Projects/Programs
Donor advised funds available

For donations make checks payable to:
Seeley Lake Community Foundation

Send donations to:
Seeley Lake Community Foundation
P.O. Box 25
Seeley Lake, MT 59868

Of Interest: The Montana Community Foundation partnered with SLCF on the playground project mentioned on page II by awarding it one of the Foundation’s first two $15,000 leadership grants under its new Local Community Foundation Leadership Program, which rewards local community foundations that provide leadership in mobilizing resources for community improvements that have widespread support.

Stevensville Community Foundation

Established: 1994
Area Served: Stevensville area

Contact Information
Contact: Paul Brantner, Treasurer or Cheryl Baldwin, Executive Director
Address: P.O. Box 413
Stevensville, MT 59870
Phone: 406-777-5654
Fax: 406-777-5654
E-mail: chewy@centric.net
Website: www.scfnews.org

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 81-0490459

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $130,267

Granting Information
Year grantmaking began: 1998
Total amount awarded since inception: $108,114
Amount awarded in previous year: $14,633

Grant type(s): Projects/Programs
Donor advised funds available

For donations make checks payable to:
Stevensville Community Foundation

Send donations to:
P.O. Box 413
Stevensville, MT 59870
Valley County Community Foundation

Established: 1995
Area Served: Valley County

Contact Information
Contact: Margareta Walstad, Treasurer or Jean Carlson, President
Address: P.O. Box 304
Glasgow, MT 59230
Phone: 406-762-3215 or 406-526-3245
Fax: 406-762-3215
E-mail: 2walstad@nemont.net or jean@nemont.net
Website: www.mtcf.org/valley_county.html

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 81-0526746

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $175,518

Granting Information
Year grantmaking began: 1999
Total amount awarded since inception: $31,915
Amount awarded in previous year: $11,869

Grant type(s): General Operations and Projects/Programs

Donor advised funds not available

For donations make checks payable to:
Valley County Community Foundation
Send donations to:
P.O. Box 304
Glasgow, MT 59230

West Yellowstone Foundation

Established: 1992
Area Served: Heben Basin - West Yellowstone area

Contact Information
Contact: Maryjean Vaessen, Executive Officer
Address: P.O. Box 255
West Yellowstone, MT 59758
Phone: 406-646-7114
Fax: 406-646-7722
E-mail: mvaessen@3riversdbs.net or mvaessen@in-tch.com
Website: www.mtcf.org/west-yellowstone.html

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 81-0494366

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 7/1-6/30
Permanent endowment(s) funds at the close of last fiscal year: $193,515

Granting Information
Year grantmaking began: 1996
Total amount awarded since inception: $294,000
Amount awarded in previous year: $11,000

Grant type(s): Capital, General Operations, and Projects/Programs

Donor advised funds available

For donations make checks payable to:
West Yellowstone Foundation
Send donations to:
c/o: Maryjean Vaessen
P.O. Box 255
West Yellowstone, MT 59758
**Whitefish Community Foundation**

Established: 2000  
Area Served: Whitefish community

**Contact Information**  
Contact: Elspeth Chambers, Office Manager  
Address: P.O. Box 1060  
Whitefish, MT 59937  
Phone: 406-863-1781  
Fax: 406-863-2628  
E-mail: info@whitefishcommunityfoundation.org  
Website: www.whitefishcommunityfoundation.org

**Legal and Tax Status**  
IRS 501(c)(3): Yes  
EIN #: 81-0533002

Affiliated with the Montana Community Foundation

**Fiscal Information**  
Accounting Cycle/Fiscal Year: 1/1-12/31  
Permanent endowment(s) funds at the close of last fiscal year: $300,000

**Granting Information**  
Year grantmaking began: 2000  
Total amount awarded since inception: $1,200,000  
Amount awarded in previous year: $347,150

Grant type(s): General Operations and Projects/Programs

Donor advised funds available

For donations make checks payable to:  
Whitefish Community Foundation

Send donations to:  
P.O. Box 1060  
Whitefish, MT 59937

---

**Winifred Endowment**

Area Served: Winifred

**Contact Information**  
Contact: Shirley Benes  
Address: P.O. Box 3  
Winifred, MT 59489  
Phone: 406-462-5316

**Legal and Tax Status**  
Affiliated with the Central Montana Community Foundation

**For donations make checks payable to:**  
Central Montana Community Foundation

On the memo line write:  
Winifred Endowment

**Send donations to:**  
Central Montana Community Foundation  
P.O. Box 334  
Lewistown, MT 59457
“While local community foundations offer great hope for funding the unmet needs of communities, that hope won’t be realized if those foundations fail to grow their permanent charitable endowments. It can really help grow endowments of local community foundations if those foundations appear to be vital and professional. So, to ensure the vitality and professionalism of the Lewis and Clark County Community Foundation, several years ago, my law firm decided to form an administrative seed fund for our local foundation. Since that time, the Foundation’s permanent endowment has continued to grow, and we are proud to be playing a role in making that growth happen.”

— Steve Browning, Founding Partner
Browning, Kaleczyc, Berry and Hoven
The community foundations presented in this section are in formation, or are in the midst of revitalization, and welcome the involvement and financial contributions of interested individuals. Because some of the foundations are new, complete information is not yet available. Some have not yet secured tax-exempt status, but are raising funds to support formation activities, such as filing with the Internal Revenue Service or gaining a fiscal sponsor. We are including available information in the event that individuals are interested in contributing or otherwise helping with start-up activities.
“We are building our foundation’s capacity to meet local needs. We want to increase the foundation’s visibility and provide examples for prospective donors about the benefits of having a local community foundation.”

— Corlene Martin, President, Rocky Mountain Front Community Foundation
Anaconda Community Foundation

Established: 2007
Area Served: Anaconda

Contact Information
Contact: Gloria O’Rourke
Address: 118 E. Seventh St., Suite 2A
          Anaconda, MT 59711
Phone: 406-563-5259
Fax: 406-563-5476
E-mail: gloria@anacondacommunityfoundation.org
Website: www.anacondacommunityfoundation.org

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 37-1541903

Granting Information
Year grantmaking began: not yet begun
Granting focus: To be determined
Grant type(s): To be determined
Donor advised funds not yet available

For donations make checks payable to:
Anaconda Community Foundation

Send donations to:
118 E. Seventh St., Suite 2A
Anaconda, MT 59711

Carter County Community Foundation

Established: 1996
Area Served: Carter County

Contact Information
Contact: Llane Carroll
Address: P.O. Box 463
    Ekalaka, MT 59324
Phone: 406-755-8724, 406-775-6642
E-mail: mathbank@midrivers.com
Website: www.mtcf.org/carter_county.html

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Permanent endowment(s) funds at the
close of last fiscal year: $14,314

Granting Information
Granting focus: Community Development
Grant type(s): Projects/Programs

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Carter County Community Foundation

Send donations to:
    Box 463
    Ekalaka, MT 59324
Columbia Falls Community Foundation

Established: 2007
Area Served: Columbia Falls

Contact Information
Contact: Sarah Dakin
Address: 830 3rd Avenue W.
          Columbia Falls, MT 59912
Phone: 406-892-3386
E-mail: sarahbow@bresnan.net

Legal and Tax Status
IRS 501(c)(3): Yes
For donations make checks payable to:
Columbia Falls Community Foundation
Send donations to:
  830 3rd Avenue W.
  Columbia Falls, MT 59912

Columbus Community Foundation

Area Served: Columbus

Contact Information
Contact: Melissa Kramer
Address: P.O. Box 462
          Columbus, MT 59019
Phone: 406-322-5688
E-mail: info@columbuscommunityfoundation.org

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150
Affiliated with the Montana Community Foundation
For donations make checks payable to:
Montana Community Foundation
On the memo line write:
Columbus Community Foundation
Send donations to:
P.O. Box 462
Columbus, MT 59019
Great Falls Area Community Foundation

Established: 1995
Area Served: Great Falls and the surrounding area

Contact Information
Contact: John Koslosky, Interim Chairman
Address: 38 Treasure State Drive
          Great Falls, MT  59404
Phone: 406-452-8724
E-Mail: jgkoslosky@bresnan.net

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1- 12/31
Permanent endowment(s) funds at the close of last fiscal year: $36,459

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Great Falls Area Community Foundation

Send donations to:
Montana Community Foundation
  PO. Box 1145
  Helena, MT  59624

About the Great Falls Area Community Foundation
Earlier in 2008, the Cascade County Community Foundation was merged with the C.M. Russell Regional Endowment Fund, and the Great Falls Area Community Foundation is the successor entity. New leadership has become engaged in revitalizing this local community foundation, with recruitment of a new and expanded board of directors being a top priority.

Greater Glendive Community Foundation

Established: 2006
Area Served: Greater Glendive

Contact Information
Contact: Kathy Ackerman
Address: 207 W. Bell
          Glendive, MT 59330
Phone: 406-377-5213 x 128
E-mail: ggcf@midrivers.com
Website: www.greaterglendive.org

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1- 12/31
Permanent endowment(s) funds at the close of last fiscal year: $36,459

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Greater Glendive Community Foundation

Send donations to:
Greater Glendive Community Foundation
  207 W. Bell
  Glendive, MT 59330
**Greater Polson Community Foundation**

Established: 2007  
Area Served: Greater Polson

**Contact Information**

Contact: Penny Jarecki  
Address: P.O. Box 314  
Polson, MT 59860  
Phone: 406-888-2248  
E-mail: pennymt@centurytel.net  
Website: www.greaterglendive.org

**Legal and Tax Status**

IRS 501(c)(3): No  
Fiscal Sponsor: Montana Community Foundation  
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

For donations make checks payable to:  
Montana Community Foundation

On the memo line write:  
Greater Polson Community Foundation

Send donations to:  
Montana Community Foundation  
P.O. Box 1145  
Helena, MT 59624

---

**Hardin Area Community Foundation**

Area Served: Bighorn County

**Contact Information**

Contact: Melissa Sutton  
Address: 406 N. Cheyenne  
Hardin, MT 59034  
Phone: 406-665-9269  
Fax: 406-665-2719  
E-mail: cityclerk@hardinmt.com

**Legal and Tax Status**

IRS 501(c)(3): No  
Fiscal Sponsor: Montana Community Foundation  
EIN #: 81-0450150

Fiscal Information

Permanent endowment(s) funds at the close of last fiscal year: $23,683

For donations make checks payable to:  
Montana Community Foundation

On the memo line write:  
Hardin Area Community Foundation

Send donations to:  
Montana Community Foundation  
P.O. Box 1145  
Helena, MT 59624
Lambert Community Foundation

Established: 2007
Area Served: Lambert

Contact Information
Contact: Libby Knotts
Address: General Delivery
        Lambert, MT 59243
Phone: 406-774-3778
E-mail: Al Thiessen at caslrok@midrivers.com

Legal and Tax Status
IRS 501(c)(3): No

For donations make checks payable to:
Lambert Community Foundation

Send donations to:
c/o: Libby Knotts
General Delivery
Lambert, MT 59243

Meagher County Community Foundation

Area Served: Meagher County

Contact Information
Contact: Jamie Doggett, Chair
Address: P.O. Box 788
        White Sulphur Springs, MT 59645
Phone: 406-547-2190
E-mail: cattlqn@mtintouch.net
Website: www.mtcf.org/meagher_county.html

Legal and Tax Status
IRS 501(c)(3): Yes
EIN: 81-053109

Affiliated with the Montana Community Foundation

Fiscal Information
Permanent endowment(s) funds at the
close of last fiscal year: $9,317

For donations make checks payable to:
Meagher County Community Foundation

Send donations to:
P.O. Box 788
White Sulphur Springs, MT 59645

Madison County Community Foundation

Established: 2007
Area Served: Madison County

Contact Information
Contact: Kim Miller
Phone: 406-751-6930
E-mail: weaver@3rivers.net

Legal and Tax Status
IRS 501(c)(3): No

Prairie County Community Foundation

Established: 2007
Area Served: Prairie County

Contact Information
Contact: Dale Hellman
Address: c/o: Hellman Insurance
        116 Logan Avenue
        Terry, MT 59349
Phone: 406-635-5782
E-mail: Hellmanins@midrivers.com

For donations make checks payable to:
Prairie County Community Foundation

Send donations to:
c/o: Hellman Insurance
116 Logan Avenue
Terry, MT 59349
Redwater Community Foundation

Established: 2007
Area Served: McCone County

Contact Information
Contact: Tod Kasten
Address: P.O. Box 520
           Circle, MT 59215
Phone: 406-485-3374
E-mail: kranches@midrivers.com

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Fiscal Information
Permanent endowment(s) funds at the close of last fiscal year: $18,000

For donations make checks payable to:
Montana Community Foundation

On memo line write
Redwater Community Foundation

Send donations to:
P.O. Box 520
Circle, MT 59215

Richland County Community Foundation

Area Served: Richland County

Contact Information
Contact: Dale Trumpower
Address: 217 W. 9th Street
           Fairview, MT 59221
Phone: 406-742-5259
E-mail: raytrumpwer@midrivers.com

For donations make checks payable to:
Richland County Community Foundation

Send donations to:
217 W. 9th Street
Fairview, MT 59221
**Three Mile Lone Rock Community Foundation**

Area Served: Ravalli County

**Contact Information**
Contact: Chris Neher or Lesli Brassfield  
Address: 1112 Three Mile Road  
P.O. Box 508  
Stevensville, MT 59870  
Phone: 406-777-7237 or 406-777-1121  
E-mail: neher@montana.com or brassfield@wildblue.net

**Legal and Tax Status**
IRS 501(c)(3): Yes  
EIN #: 81-0527666

Affiliated with the Montana Community Foundation

**Fiscal Information**
Permanent endowment(s) funds at the close of last fiscal year: $30,022

For donations make checks payable to: Three Mile Lone Rock Community Foundation

Send donations to:  
1112 Three Mile Road  
P.O. Box 508  
Stevensville, MT 59870

---

**Tobacco Valley Community Foundation**

Area Served: Tobacco Valley

**Contact Information**
Contact: Mary Lou Peterson  
Address: 234 Glen Drive  
Eureka, MT 59917  
Phone: 406-889-3870  
E-mail: billpluid@interbel.net

**Legal and Tax Status**
IRS 501(c)(3): No  
Fiscal Sponsor: Montana Community Foundation  
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

**Fiscal Information**
Permanent endowment(s) funds at the close of last fiscal year: $36,832

For donations make checks payable to: Montana Community Foundation

On the memo line write:  
Tobacco Valley Community Foundation

Send donations to:  
Montana Community Foundation  
P.O. Box 1145  
Helena, MT 59624
Western Montana Community Foundation
(formerly Five Valleys Regional Endowment Fund)

Established: 2007
Area Served: Missoula, Ravalli, Mineral, Granite Counties and adjacent counties

Contact Information
Contact: Susan Talbot, Secretary-Treasurer
Address: 11 Greenbrier Dr.
        Missoula, MT 59802
Phone: 406-549-8438
E-mail: jtalbot11@montana.com

Legal and Tax Status
IRS 501(c)(3): Yes
EIN #: 30-0417202

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $50,286

Granting Information
Year grantmaking began: not yet begun
Grant type(s): Projects/Programs, General Operations
Donor advised funds not yet available

For donations make checks payable to:
Western Montana Community Foundation
Send donations to:
        Susan Talbot
        11 Greenbrier Dr.
        Missoula, MT 59802

About the Western Montana Community Foundation
For many years the volunteers behind the WMCF functioned as a regional committee of the Montana Community Foundation and awarded small grants. When MCF decided to no longer have regional committees, the group formed a new 501(c)(3) organization to fill the gap.
Dormant Foundations

The community foundations in this section have legal structure and endowment funds in their accounts; however, they are inactive at this time. An infusion of support and enthusiasm could revitalize them to benefit their local communities.
"We’re happy that we are able to bring money in from the outside to re-grant while we’re building our endowment. We have been able to assist a wide variety of organizations across the county and have made a real difference to them."

— Steve Owens, Secretary
Powell County Community Foundation
Darby Town Endowment Fund

Established: 2000
Area Served: Darby community

Contact Information
Contact: Richard Ackerman, Advisory Chair
Address: P.O. Box 559
        Darby, MT 59829
Phone: 406-821-4999
Fax: 406-821-4394
E-mail: rbdarby@initco.net

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $47,933

Granting Information
Year grantmaking began: 2005
Total amount awarded since inception: $2,500
Amount awarded in previous year: 0

Granting focus: Community Services/Facilities, Economic Development, and Education

Donor advised funds not yet available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Darby Town Endowment

Send donations to:
Montana Community Foundation
P.O. Box 1145
Helena, MT 59624

Gallatin County Community Foundation

Area Served: Gallatin County

Contact Information
Contact: Cathy Cooney
Address: Montana Community Foundation
        17 2nd St., East, Suite 210
        Kalispell, MT 59901
Phone: 406-755-4525
Fax: 406-755-4525
E-mail: ccooney@mtcf.org
Website: www.mtcf.org/gallatin_county.html

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Permanent endowment(s) funds at the close of last fiscal year: $30,168

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Gallatin County Community Foundation

Send donations to:
Montana Community Foundation
P.O. Box 1145
Helena, MT 59624
Lake County Community Foundation

Area Served: Lake County

The Lake County Community Foundation is being merged with the Greater Polson Community Foundation. Please refer to page 42 for information on the Greater Polson Community Foundation.

Contact Information
Contact: c/o Montana Community Foundation
Address: P.O. Box 1145
         Helena, MT 59624
Phone: 406-443-8313

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Permanent endowment(s) funds at the close of last fiscal year: $7,473

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Lake County Community Foundation

Send donations to:
Montana Community Foundation
P.O. Box 1145
Helena, MT 59624

Lincoln Valley Community Foundation

Established: 1992
Area Served: Greater Lincoln area

Contact Information
Contact: Laura Nicolai
Address: P.O. Box 985
         Lincoln, MT 59639
Phone: 406-362-4313
Fax: 406-362-4232
E-mail: lauran@montana.com

Legal and Tax Status
IRS 501(c)(3): No
Fiscal Sponsor: Montana Community Foundation
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

Fiscal Information
Accounting Cycle/Fiscal Year: 1/1-12/31
Permanent endowment(s) funds at the close of last fiscal year: $48,717

Granting Information
Year grantmaking began: 2004
Total amount awarded since inception: $2,000
Amount awarded in previous year: $2,000

Donor advised funds not available

For donations make checks payable to:
Montana Community Foundation

On the memo line write:
Lincoln Valley Community Foundation

Send donations to:
P.O. Box 985
Lincoln, MT 59639
**Sheridan County Community Foundation**

Established: 1995  
Area Served: Sheridan County  

**Contact Information**  
Contact: Charlie Archer  
Address: 338 N. Main  
Plentywood, MT 59254  
Phone: 406-765-2148  
Fax: 406-765-1400  
E-mail: 2charlie@nemontel.net  
Website: www.mtcf.org/sheridan.html

**Legal and Tax Status**  
IRS 501(c)(3): No  
Fiscal Sponsor: Montana Community Foundation  
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

**Fiscal Information**  
Accounting Cycle/Fiscal Year: 7/1-6/30  
Permanent endowment(s) funds at the close of last fiscal year: $26,987

For donations make checks payable to:  
Montana Community Foundation

On the memo line write:  
Sheridan County Community Foundation

Send donations to:  
338 North Main  
Plentywood, MT 59254

---

**Sanders County Community Foundation**

Area Served: Sanders County

**Contact Information**  
Contact: c/o: Montana Community Foundation  
Address: P.O. Box 1145  
Helena, MT 59624  
Phone: 406-443-8313

**Legal and Tax Status**  
IRS 501(c)(3): No  
Fiscal Sponsor: Montana Community Foundation  
EIN #: 81-0450150

Affiliated with the Montana Community Foundation

**Fiscal Information**  
Permanent endowment(s) funds at the close of last fiscal year: $7,473

For donations make checks payable to:  
Montana Community Foundation

On the memo line write:  
Sanders County Community Foundation

Send donations to:  
Montana Community Foundation  
P.O. Box 1145  
Helena, MT 59624
Resources

Organizations

Big Sky Institute for the Advancement of Nonprofits
PO. Box 1514
Helena, MT  59624
(406) 443-5860

Council on Foundations
2121 Crystal Dr., Suite 700
Arlington, VA  22202
(800) 673-9036

Community Foundations of America
462 S. 4th St., Suite 2420
Louisville, KY 40202
(502) 581-0804

The Foundation Center
79 Fifth Avenue
New York, NY 10003
(212) 620-4230

Montana Community Foundation
101 N. Last Chance Gulch, Suite 211
PO. Box 1145
Helena, MT  59624
(406) 443-8313

Websites

www.communityfoundations.net
A collaborative promotion of the Council on Foundations and Community Foundations of America as a resource for professional advisors, donors, and media representatives

www.communityphilanthropy.org
Resource site hosted by the Monitor Institute and Blueprint Research and Design, Inc. with funding from the Ford Foundation and the Charles Stewart Mott Foundation.

www.cof.org
Council on Foundations website

www.givingnet.net
Community Foundations of America website

www.foundationcenter.org
The Foundation Center website

www.endowmontana.org
Website of the Governor’s Task Force on Endowments and Philanthropy

www.mtcf.org
Montana Community Foundation website, which hosts web-based information for many local community foundations.

Downloadable Publications and Tools for Clients

www.communityfoundations.net

- Charitable Giving Checklist: Deciding to Give
- For Real Estate, Timing Is Everything
- About Community Foundations
- Charitable Funds Overview
- Charitable Instruments Overview
- Gift of Real Estate
- Gift of Appreciated Stock
- Donor Advised Fund
- Charitable Gift Calculator
“Over the next ten years, it is projected that nearly nine billion dollars will pass out of the estates of Montana residents. Local and county community foundations are critical to retaining a portion of that wealth to preserve Montana’s legacy.”

— Governor Brian Schweitzer

BUILDING WEALTH AND PHILANTHROPY
THANK YOU FOR THE EXCELLENT SUPPORT FROM:

About Big Sky Institute

Big Sky Institute for the Advancement of Nonprofits (BSI) is a Montana nonprofit organization headquartered in Helena. Founded in 1999, BSI develops philanthropic and nonprofit sector resources and programs in Montana and other Philanthropic Divide states. To learn more about our projects that are expanding rural philanthropy and strengthening nonprofits, please visit our website at www.bigskyinstitute.org.

We produced this guide for financial advisors as the first of many statewide initiatives to galvanize attention and resources for helping develop our state’s local and county community foundations—Montana’s best strategy for building localized philanthropic capacities to help local communities secure their future. Our state has a paucity of foundations, with limited permanent assets. Over the last 10 years, Montana’s ranking with respect to in-state foundation assets, compared to all states and the District of Columbia, has slipped from 47th to 49th. One way our state can push back from the bottom and make a difference is by developing the assets of local, county and multi-county community foundations.

Most Montana local community foundations are in rural, low-population counties. They often lack the resources needed for outreach to engage prospective donors. This guide is intended to help those communities capture a share of the largest inter-generational transfer of wealth in our nation’s history, which is affecting Montana earlier than many other parts of the country.

BSI is grateful for support from the Otto Bremer Foundation, Lora L. and Martin N. Kelley Family Foundation, Ford Foundation and W.K. Kellogg Foundation for their generous support of the project that resulted in this guide. We are also deeply appreciative of the generous support of many corporate sponsors, featured in the guide, who helped underwrite printing and dissemination costs. For the record, the information contained herein is solely the responsibility of Big Sky Institute for the Advancement of Nonprofits.

© Big Sky Institute for the Advancement of Nonprofits 2008
JUST LIKE THE BEATLES, WE GET BY WITH A LITTLE HELP FROM OUR FRIENDS.

A VERY SPECIAL THANKS GOES TO

AS MUCH AS YOU MIGHT LIKE TO, YOU CAN’T STAY IN MONTANA FOREVER.
(SOMEDAY YOU GOTTA LEAVE THIS EARTH.)

BUT YOUR LEGACY IS WELCOME TO STAY.

FOR THEIR FINANCIAL SUPPORT OF THIS GUIDE.

PD. Box 1514
Helena, MT  59624
ph: (406) 443 - 5860
fx: (406) 443 - 4046
e: info@bigskyinstitute.org
w: www.bigskyinstitute.org

2008 Guide to Supporting Montana’s Local and County Community Foundations