What your 2017 donations look like.

177 CARE PACKAGES SENT TO OUR TROOPS

58 DAYS OF SUPPORT FOR A 10 PERSON TRAIL CREW

2,560 MEALS

58 DAYS OF SUPPORT FOR A 10 PERSON TRAIL CREW

2,560 MEALS

1,269 HIV TESTS

10,138 POUNDS OF FOOD

PROVIDE ACCESS TO FOOD FOR 33 HOMELESS LGBTQ YOUTH

10,138 POUNDS OF FOOD

264 PETS ADOPTED
334 PETS NEUTERED
34 SERVICE DOGS VESTS
5,368 POUNDS OF DOGFOOD

264 PETS ADOPTED
334 PETS NEUTERED
34 SERVICE DOGS VESTS
5,368 POUNDS OF DOGFOOD

THAT LEFT $83,046.30 TO PROMOTE THE ARTS, PROTECT THE ENVIRONMENT, KEEP OUR CHILDREN SAFE, PROTECT HISTORY, SUPPORT CANCER PATIENTS, AND PROMOTE PEACE.
**RMD - Required Minimum Distributions from IRAs**

**What are your options?**

You are about to turn 70 1/2. Your taxes could go up because of increased income from a Required Minimum Distribution, or RMD, from your IRA.

That may be just fine, or you may want to reduce your taxes AND support your favorite charities. Montana Shares is happy to help you save with the IRA Qualified Charitable Distributions, QCD.

**What is the IRA Qualified Charitable Distributions?**

The provision allows individuals who are 70 1/2 or older to direct their IRA administrator to send up to $100,000 per year to a qualified charity, instead of to the account holder.

Individuals may direct part of their Required Minimum Distribution (RMD), all of their RMD or additional amounts, up to $100,000 per year.

**How does this save money on my taxes?**

Individuals who must take a minimum annual distribution from IRA accounts must also pay taxes on that income. The IRA Qualified Charitable Distributions is the only way that individuals who are 70 1/2 or over can avoid taking the mandatory distribution and therefore, avoid paying taxes on that distribution.

**Can I make a charitable rollover gift using other types of retirement accounts as well?**

No. Qualified Charitable Distributions is only available using IRA accounts, not 401(k) or 403(b) accounts.

**What is the RMD?**

You cannot keep retirement funds in your account indefinitely. You generally have to start taking withdrawals from your IRA, SIMPLE IRA, SEP IRA, or retirement plan account when you reach age 70 1/2. Roth IRAs do not require withdrawals until after the death of the owner.

Your required minimum distribution is the minimum amount you must withdraw from your account each year.

Your withdrawals will be included in your taxable income except for any part that was taxed before (your basis) or that can be received tax-free (such as qualified distributions from designated Roth accounts).

**Which taxpayers may benefit:**

- Taxpayers who claim the standard deduction. With the increase to the standard deduction ($12,000/$24,000) it is estimated that approximately 90%-95% of taxpayers will no longer itemize.
- Couples with more than $170,000 of modified adjusted gross income and individuals with more than $85,000 may be able to use QCD to avoid higher Medicare premiums.
- Taxpayers who itemize and incur large medical or dental expenses.
- Taxpayers who receive Social Security income and have limited other sources of income may use the QCD to reduce or eliminate the amount of Social Security subject to taxation.
- Taxpayers who are constrained on the size of their charitable income deduction (generally 50% of adjusted gross income).
- Rental property owners who actively participate in property’s rental activity can use the QCD to qualify for larger allowable rental loss.

**What do Montana Shares and Netflix have in Common?**

What we have in common with Netflix is we can make charitable giving as easy as a small monthly charge on your credit card. Netflix makes it easy for you to spend money on entertainment. Montana Shares can make it just as easy to support the causes that you care about. With a quick and easy one-time setup, you can provide year-round support to the charities that make Montana such a great place to live, work, and raise a family.

If you do not have access to workplace giving, this is the next best way to give. You can go to [https://www.ipledgeonline.org/_msw/](https://www.ipledgeonline.org/_msw/), choose how much you want to give each month, choose what groups you’d like to support, and you are set for the year.
Impact statements give you a quick look at an issue and a solution. The following impact statements from our members demonstrate their work throughout the state. *(denotes new member groups)*

**Alternative Energy Resources Organization (AERO)**
It is clear our world can no longer support practices that waste precious resources. AERO promotes sustainable agriculture, renewable energy and conservation, and community self-reliance. aeromt.org

**AniMeals**
In the United States an estimated ten million animals are abandoned to shelters every year. Many of the shelters & rescue groups who house & feed these animals are struggling daily. The purpose of AniMeals work is to supplement the food needs of organizations so they can focus their money on medical needs & operational costs. AniMeals works to ensure there are no more hungry animals in Montana. animeals.com

**Big Brothers Big Sisters of Montana**
We believe that inherent in every child is the ability to succeed and thrive in life. Most children served by Big Brothers Big Sisters live in single-parent and low-income families, or households where a parent is incarcerated. As the nation’s largest donor and volunteer supported mentoring network, Big Brothers Big Sisters makes meaningful, monitored matches between adult volunteers “Bigs” and children “Littles”. montanabbsbs.blogspot.com

**Bike Walk Montana**
A person walking has a one in ten chance of surviving if they are struck by a motor vehicle traveling at speeds of 40 mph or greater. Bicycling and walking are healthy activities that should be safe. Bike Walk Montana fights for your rights to have safe places to bike and walk. bikewalkmontana.org

**Bridgercare**
In the U.S., a poor woman is FOUR TIMES as likely to experience an unplanned pregnancy as a higher-income woman, an estimated 44% of pregnancies in Montana are unintended, and 1 in 4 teen girls will get pregnant at least once by age 20. Investment in family planning services is highly cost-effective. nationally, for every $1 invested in helping women avoid unintended pregnancies they did not want to have saved $7.09 in public expenditures that otherwise would have been needed. bridgercare.org

**Camp Mak-A-Dream**
What started out as one camp in 1995 for 46 campers has turned into 13 different camps and retreats. As specific needs were identified, we created programming to meet those unique needs, such as our sessions for brain tumor survivors, sessions for siblings (children and teens who aren’t sick themselves but someone in their family has or has passed away from cancer) and long weekend retreats for women with cancer. We partner with medical professionals across the country to help identify gaps in services and how Camp Mak-A-Dream can help fill those gaps. campdream.org

**Cancer Support Community Montana**
The daily demands of living with a life-threatening disease are a constant struggle. Cancer Support Community Montana’s free programs and services help individuals & families rediscover a healthy balance and celebrate hope. Cancer Support Community Montana helps families live well with, through, and beyond cancer. cancersupportmontana.org

**Disability Rights Montana**
Montanans living with disabilities want to be included in everyday living and need access to appropriate support and services. DRM actively works to make local communities more physically accessible. DRM also advocates to bring support and services to your community and to protect your right to live, receive an education, work, and recreate in your local community. disabilityrightsmt.org

**Friends of the Historical Museum at Fort Missoula**
A study from Emory University has shown that youth who know about their family’s history have increased “self-confidence and are proven to be more resilient”. The Historical Museum at Fort Missoula preserves our state’s history, promotes critical thinking, and creates programs that connect youth with the past. The Friends of the Historical Museum at Fort Missoula raise funds for educational programs and internships, exhibits and collections care, restoration projects and preservation of archaeological sites and historic buildings, and events for the enjoyment of our community. fortmissoulamuseum.org

**Friends of the Missouri Breaks Monument**
The Missouri Breaks Monument contains one of the few remaining fully functioning cottonwood gallery forest ecosystems on the Northern Great Plains. Flood control, cattle grazing along the banks, and now climate change are taking a toll on what many call the historic tree of the American prairie. In 2010, more than half of the trees along the river were more than 50 years old. We’re leading a public-private partnership (with BLM and landowners along the river) with the long-term goal of shifting this demography so that more than half of the trees are younger than 50 years old. missouribreaks.org

**Great Falls Community Food Bank, Inc.**
More than 300,000 Montanans are considered at risk of food insecurity. The Great Falls Community Food Bank is one of only three true food bank warehouse/distribution facilities in Montana. Serving four counties and 63 emergency food sites, the Food Bank distributed over 475 tons of food which provided over 755,250 meals for children, seniors, and adults. greatfallsfoodbank.org

**Heart of the Valley Animal Shelter**
Heart of the Valley Animal Shelter (HOV) provides services to nearly 3,700 animals through all HOV programs (including SNAP Clinic). In addition, HOV offers a host of programs and services to the community to help connect people and pets.
Montana Association for the Blind, Inc.
An estimated 20,000 to 25,000 Montanans are blind or “visually impaired.” The Montana Association for the Blind actively advocates on behalf of equality and opportunity for all blind and low vision Montanans statewide. The MAB also provides programs that teach and develop skills critical to maintaining independence and employment or to pursue educational and vocational goals.

mabsop.org

Montana Audubon
Montana has lost more than 50% of its historic wetlands, and more than one-third of the birds that nest in the state are declining rangewide. Accelerating development along Montana’s streams and rivers is damaging water quality, fish and wildlife habitat, and recreational opportunities. Montana Audubon works to ensure that all native wildlife populations are healthy and sustainable by protecting and conserving their natural habitats.

mtaudubon.org

Montana Child Care Resource & Referral Network
MCCRRN links parents to available childcare and afterschool programs and helps low-income working families pay for these services. By training early education and afterschool workers, MCCRRN builds a quality care & education system & helps make it accessible to all Montana families.

mtchildcare.org

Montana Discovery Foundation
We believe that education and recreation opportunities on National Forest Lands should be accessible. We provide opportunities in all seasons for people of all ages to learn about and enjoy YOUR public lands.

montanadiscoveryfoundation.org

Montana Food Bank Network, Inc.
One in seven Montanans, and 1 in 5 Montana children, struggle with hunger today. The Montana Food Bank Network reduces hunger by acquiring and distributing food, educating the public, and advocating on behalf of people in need.

mbfn.org

Montana Generational Justice Foundation
Many Montana seniors are victims of fraud and exploitation, many more have not completed their end-of-life documents nor have the documents necessary to protect them should they become mentally or physically disabled. In addition, hundreds of Montanans suffer from dementia. We have created a comprehensive structure through our partner organizations to serve all the legal needs of Montana’s seniors.

mtgenjustice.org

Montana History Foundation
The Montana History Foundation is the only charitable foundation in the state solely dedicated to funding projects preserving Montana’s unique and important history. Without our help, historic buildings disappear, collections and artifacts become inaccessible to the public, and the memories and life experiences of our elders are lost forever. Since 2012 the Foundation has raised and granted over $578,000 for 147 projects in 68 communities in 40 counties across the state from Libby to Lima to Sidney to Ekalaka.

mthistory.org

Montana Legal Services Association
Financial barriers to the legal system erode the promise of equal justice for all created by our founding fathers. MLSA helps ensure access to justice for low-income Montanans by providing free civil legal aid for people with incomes at or below the 125% of the federal poverty rate. In 2016, MLSA helped 7,540 Montanans, including 3,400 children, through easy-to-understand forms and legal self-help and by providing assistance in 3,198 cases.

mtlsa.org

Montana 4-H Foundation, Inc.
While many organizations concentrate on problems of youth or seek to change their behavior, 4-H embraces positive youth development. 4-H youth are able to identify their interests, set goals, and work with positive adult role models and other young people who share their passion and interests. Focusing on the strengths and talents, 4-H engages them in a structured system of learning, by setting goals and measuring success to help them grow and prosper.

montana4h.org

Montana Meth Project
Our engagement has never been stronger. Our prevention message is reaching teens and we are the leading, most trusted resource on Meth prevention, with Montana leading states like Georgia and Colorado in teaching the Meth Prevention Lesson while their population is 5.5 and 10 times that of ours.
Montana Natural History Center
We are addressing the need of nature education programming for people of all ages. There is a disconnect from the outdoors which contributes to a number of mental and physical health challenges, as well as a disinterest in activities that Montanans consider part of our heritage like camping, fishing, and hunting. To address this issue, we are taking kids and adults outside, and teaching them about the natural history of Montana through science based nature education. montananaturalist.org

Montana Restoration Foundation
The Montana Restoration Foundation exists to promote the restoration of, and education regarding, public historic buildings in Montana. mtogm.org

Montana Spay/Neuter Task Force
The Task Force teaches respect for life. Its mission is to reverse the universal acceptance of killing as a solution to pet overpopulation by using education, low-cost spay and neuter, and community involvement. montanaspayneutertaskforce.org

Montana Supporting Military
Many deployed troops, wounded warriors, and veterans do not receive support for needed items. We send approximately 9,000 pounds of goods to over 1,000 deployed troops each year. We also actively support our Montana wounded warriors and veterans in various ways whenever a need arises. mtsupportingmilitary.org

Montana Trout Unlimited
Montana Trout Unlimited conserves and protects Montana’s coldwater fisheries, which helps wild and native trout. The presence of abundant, healthy trout produces a positive environmental and economic benefit for humans too. Native trout impact entire ecosystems, from grizzly bears to eagles. Angling contributes more than $237,000,000 to the economy in Montana every year. montanatu.org

Montana Watershed Coordination Council
Montana’s water resources are precious, as Montana’s waters not only serve Montanans, but also much of the western and central United States. However, this vital resource is increasingly fragile, due to droughts, severe climate fluctuations, pollution, and increased demands. mtwatersheds.org

Montana Wilderness Association
Only 3% of Montana’s wilderness is protected under the Wilderness Preservation System. Through grassroots organizing, public education, and our Wilderness Walks programs, Montana Wilderness Association encourages citizens to become advocates for the protection of crucial wildlife habitat, clean watersheds, and the preservation of our states unique and beautiful landscapes. wildmontana.org

Montana Wildlife Federation
The Montana Wildlife Federation gives a voice to hunters, anglers, and other conservationists in order to safeguard our fish and wildlife, land and water, and public access. MWF works to support the rights of everyone who hunts, fishes, or just enjoys the opportunity to see and experience wildlife in our state. montanawildlife.org

NAMI Montana
One in five families are affected by serious mental illness. NAMI provides them with a voice. NAMI Montana is dedicated to improving the lives of all of those affected with serious mental illness. We have education classes and ongoing support groups for people with mental illness and their families. The classes provide information on mental illness, treatments, and resources for families and loved ones who have a mental illness. The ongoing support groups help them discover they are not alone in the fight against mental illness. namimt.org

NeighborWorks Montana
Montanans continue to struggle to get a strong financial footing. The high cost of housing, coupled with low wages and high debt from student loans and other sources makes it difficult for many in our state to find affordable, stable housing. NWMT provides a range of housing-related support individuals and families need to help overcome these challenges. Homeownership continues to be a source of stability and asset growth that is important to long-term success. Affordable housing is also an important economic engine, bringing stability to communities and the workforce — home is where jobs go to sleep at night. NeighborWorks Montana is working hard on policy issues that affect housing growth and development, on preservation and replacement strategies for manufactured housing, and on homeowner education and financial coaching to help current and potential homeowners succeed across the state. nwmt.org

Pride Foundation
Nearly ninety percent of LGBTQ students experience harassment and/or bullying at school. Approximately forty percent of homeless youth identify as LGBTQ and of those forty percent, approximately seventy percent report being rejected by their families when they came out. Pride Foundation is poised to invest and help build the capacity of local non-profits dedicated to addressing these issues as well as other critical issues facing the LGBTQ community in Montana. Since 2002, Pride Foundation has awarded $193,850 in scholarship funds to 59 LGBTQ and/or allied student leaders in Montana— supporting them as they strive to achieve their educational dreams. Since 1993, Pride Foundation has invested $493,037 in organizations throughout Montana to support and connect local leaders and organizations working to expand opportunities and provide support and resources to LGBTQ youth, adults and families across the state. pridefoundation.org

Queen City Ballet Company
Queen City Ballet Company affords dance students and the general public the experience of high-quality, professional full-length ballets with professional guest artists, lighting, costumes and sets. QCBC contributes to a vibrant cultural community by offering at least two performances a year, the Nutcracker Ballet and a full-length spring classical ballet production and/or a contemporary work. A dancer that aspires to a career in ballet can receive the experience and education in the art of performance to prepare for a career in dance. The Company offers scholarships for performance fees and summer incentives with QCBC. queencityballet.com

Rural Employment Opportunities, Inc. (REO)
Rural families who work seasonally have limited income and resources and struggle to maintain economic stability. Rural Employment Opportunities helps limited-income Montanans and their children with emergency assistance and access to education, employment, and job-training activities that lead to year-round employment, improved family income, and greater economic security. reomontana.org

Susan G. Komen Idaho Montana
Komen Idaho Montana has funded over $7.1 million in grants to assist men and women in Idaho and Montana with breast health screenings, diagnostic services and patient assistance. In 2016-2017 Komen Idaho Montana funded 1,194 mammograms, 127 diagnostic procedures and detected 44 breast cancers. They also provide 92 women with financial assistance during their breast cancer battle and over $2.3 million to the Komen National Research Grant Portfolio to fund ground breaking and lifesaving breast cancer research. komendidahomontana.org
Send your donation to:
Montana Shares
PO Box 883
Helena, MT  59624

Print name: ____________________________
Address: ______________________________
City/Zip:_______________________________
E-mail: _______________________________
Phone: _______________________________

Enclosed is my check payable to
Montana Shares for $________________.

To give by credit card, please use our
secure online giving tools at
www.montanashares.org.

We honor your choice. You may designate all or
part of your donation to go to one or more of our
member groups listed on the right; otherwise,
your tax deductible gift will be shared among
members.

Thank you!

___Montana Shares (for work with its members)
___Alternative Energy Resources Organization
   (AERO)
___AniMeals
___Big Brothers Big Sisters of Montana
___Bike Walk Montana
___Bridgercare
___Camp Mak-A-Dream
___Cancer Support Community Montana
___Disability Rights Montana
___Friends of the Historical Museum at Fort
   Missoula
___Friends of the Missouri Breaks Monument
___Great Falls Community Food Bank, Inc.
___Heart of the Valley Animal Shelter
   Holter Museum of Art, Inc.
___Jeannette Rankin Peace Center
___K9 Care Montana
___Last Chance Community Pow Wow
___Lewis and Clark Humane Society
___Mai Wah Society, Inc.
___Montana 4-H Foundation
___Montana Association for the Blind, Inc.
___Montana Audubon
___Montana Child Care Resource & Referral
   Network, Inc.
___Montana Discovery Foundation
___Montana Food Bank Network, Inc.
___Montana Generational Justice Foundation
___Montana History Foundation
___Montana Legal Services Association
___Montana Meth Project
___Montana Natural History Center
___Montana Restoration Foundation
___Montana Spay/Neuter Task Force
___Montana Supporting Soldiers
___Montana Trout Unlimited
___Montana Watershed Coordination Council
___Montana Wilderness Association
___Montana Wildlife Federation
___NAMI Montana
___NeighborWorks Montana
___Pride Foundation
___Queen City Ballet Company
___Rural Employment Opportunities, Inc. (REO)
___Susan G Komen Idaho Montana
___Undesignated
New member applications accepted this winter

If you know a nonprofit interested in applying to participate as a member of Montana Shares in the 2019-2020 campaign, have them contact the Shares office for the criteria, requirements and application packet. Deadline: March 1st, 2019.

Organizations must have a current 501(c)(3) IRS tax exemption and agree to work toward the Shares’ mission, vision and values. There is a list of requirements and an application process posted on our web site. This ensures our donors are supporting solid, accountable nonprofits working to make Montana a better place to live. If accepted, they will be able to participate in Montana Shares’ public and private workplace campaigns.

Accountability and Disclosures

Montana Shares is audited annually and meets the national standards for workplace giving federations set by Community Shares USA. For 2017 fiscal year, our IRS Form 990 reflects a low 4.9% fundraising/general management expense compared to revenue. Our IRS 990 and audited financial statements are posted on our web site. We hold our members to accountability standards as well, so the donors and employers can be confident that the contributions are supporting the causes intended and are being well managed.

Montana Shares raised $242,595 for campaign year 2018 and $281,797 for campaign year 2017. Distributions to members are 85% of actual collected pledges; 100% of campaign contributions stay in Montana. Fifteen percent is withheld from collected contributions for program support. 8.1% of our pledges were uncollectible. Member organizations pay annual dues based on a percentage of funds received. They commit to actively working with Shares to open and grow workplace giving campaigns. Members help Montana Shares with our work. Based on their involvement, they receive designated pledges plus a proportional share of undesignated pledges based on our member-approved policy.

Annual Report

2017 Financial Report

Revenue - $352,666

- Contributions and Grants $312,565
- Fundraisers $23,297
- Dues $21,009
- Other Income $25,106

Expenses - $351,938

- Distribution to Members $216,203
- Personnel $100,539
- Accounting $7,520
- Rent $6,024
- Travel $1,819
- Other $19,833

Program, Administration & Fundraising Percentages

- Program Expenses - 95%
- Fundraising Expenses - 3%
- Administrative Expenses - 2%

Montana Shares is a partnership of Montana-based nonprofit groups devoted to improving the quality of life in communities throughout the state. Our members promote, protect and preserve our state’s human, animal, cultural and natural resources. They work on issues concerning women, children, families and seniors, health and hunger, the environment, arts and culture, education, domestic and wild animals, social justice and human rights. The purpose of Shares is to work with and on behalf of our members to promote and support their programs, provide training, technical assistance, consultation and financial support on a year-round basis and, thereby, to help them expand and diversify their programs that serve Montanans. Contributions received at Montana Shares further serve to accomplish these purposes.

Council Officers - 2018-2020

President - Dave Chadwick
Vice President - Melinda Barnes
Secretary - Darbie Hess
Treasurer - Katherine Dalton
Past President - Stephanie McDowell

Montana Shares at-large members and term ends working on behalf of all members of Shares:

- Dave Cooper, Helena, 5/19
- Darbie Hess, Helena 5/20
- Debbie Spranget, Helena 9/19
- Mary Wright, Helena, 5/19

Council members Individual (representation) (term ends)

- Katie Biggs (NeighborWorks Montana) (5/19)
- Dave Chadwick (MT Wildlife Federation) (5/19)
- Dave Cooper (At-large member) (5/19)
- Katherine Dalton (REO) (5/19)
- Darbie Hess (At-large member) (5/20)
- Bill Mathews (MT Food Bank Network) (9/19)
- Jerry McCarthy (MT Discovery Foundation) (9/19)
- Stephanie McDowell (Bridgercare) (5/19)
- Debbie Spranget (At-large member) (9/19)
- Kelley Willett (Montana Trout Unlimited) (5/19)
- Mary Wright (At-large member) (5/19)

Montana Shares Staff

Bill Crane, Executive Director
Kristi Paulsen, Office Manager
Heidi Hieser, Accountant

Member of:

Community Shares USA
communitysharesusa.org

Montana Nonprofit Association
mtnonprofit.org

montanashares.org
Thank you to Montana Shares 2018 Raffle Donors

Every year Montanans and individuals beyond our borders donate to support the work of Montana Shares in a variety of ways. This year's raffle, with 24 fabulous prizes including 8 prize packages, raised $25,477. Thank you to our hard working members' staff and boards, our council and friends for your help and support. Thank you one and all! The winners of the 2018 raffle drawing were notified following the 9/14/18 drawing and their names are posted on our web site. Visit montanashares.org home page, go to Fundraising then Annual Raffle for the raffle results.