

Montana's Transfer of Wealth Opportunity

Over the next 10 years, Montanans will transfer billions of dollars to the next generation. It's estimated that by 2020, \$12 billion will pass from one generation to the next. The question is whether any of that wealth will stay behind in the communities that helped build it.

County	10-Year Transfer	If 5% Endowed	5% Granted (per year)
Beaverhead County	\$104,133,625	\$5,206,681	\$260,334
Big Horn County	\$80,779,447	\$4,038,972	\$201,949
Blaine County	\$44,452,122	\$2,222,606	\$111,130
Broadwater County	\$86,146,366	\$4,307,318	\$215,366
Carbon County	\$138,638,440	\$6,931,922	\$346,596
Carter County	\$8,104,541	\$405,227	\$20,261
Cascade County	\$1,208,726,150	\$60,436,307	\$3,021,815
Chouteau County	\$80,395,200	\$4,019,760	\$200,988
Custer County	\$129,575,138	\$6,478,757	\$323,938
Daniels County	\$21,340,048	\$1,067,002	\$53,350
Dawson County	\$93,850,355	\$4,692,518	\$234,626
Deer Lodge County	\$117,722,873	\$5,886,144	\$294,307
Fallon County	\$26,865,651	\$1,343,283	\$67,164
Fergus County	\$149,163,192	\$7,458,160	\$372,908
Flathead County	\$1,123,838,859	\$56,191,943	\$2,809,597
Gallatin County	\$1,276,856,386	\$63,842,819	\$3,192,141
Garfield County	\$7,970,113	\$398,506	\$19,925
Glacier County	\$92,911,158	\$4,645,558	\$232,278
Golden Valley County	\$11,451,189	\$572,559	\$28,628
Granite County	\$40,888,676	\$2,044,434	\$102,222
Hill County	\$159,412,237	\$7,970,612	\$398,531
Jefferson County	\$135,990,037	\$6,799,502	\$339,975
Judith Basin County	\$23,949,582	\$1,197,479	\$59,874
Lake County	\$309,806,547	\$15,490,327	\$774,516
Lewis and Clark County	\$817,021,567	\$40,851,078	\$2,042,554
Liberty County	\$36,694,999	\$1,834,750	\$91,737
Lincoln County	\$149,555,274	\$7,477,764	\$373,888
Madison County	\$88,521,810	\$4,426,090	\$221,305
McCone County	\$18,377,704	\$918,885	\$45,944
Meagher County	\$19,250,636	\$962,532	\$48,127
Mineral County	\$32,718,158	\$1,635,908	\$81,795
Missoula County	\$1,393,294,223	\$69,664,711	\$3,483,236
Musselshell County	\$52,817,158	\$2,640,858	\$132,043

County	10-Year Transfer	If 5% Endowed	5% Granted (per year)
Park County	\$181,774,475	\$9,088,724	\$454,436
Petroleum County	\$9,280,291	\$464,015	\$23,201
Phillips County	\$42,284,871	\$2,114,244	\$105,712
Pondera County	\$61,282,764	\$3,064,138	\$153,207
Powder River County	\$16,077,795	\$803,890	\$40,194
Powell County	\$71,384,235	\$3,569,212	\$178,461
Prairie County	\$16,041,016	\$802,051	\$40,103
Ravalli County	\$545,377,968	\$27,268,898	\$1,363,445
Richland County	\$106,886,983	\$5,344,349	\$267,217
Roosevelt County	\$61,022,569	\$3,051,128	\$152,556
Rosebud County	\$72,783,942	\$3,639,197	\$181,960
Sanders County	\$102,609,770	\$5,130,489	\$256,524
Sheridan County	\$50,912,099	\$2,545,605	\$127,280
Silver Bow County	\$435,163,643	\$21,758,182	\$1,087,909
Stillwater County	\$78,469,030	\$3,923,452	\$196,173
Sweet Grass County	\$79,488,487	\$3,974,424	\$198,721
Teton County	\$62,142,103	\$3,107,105	\$155,355
Toole County	\$51,539,311	\$2,576,966	\$128,848
Treasure County	\$10,257,525	\$512,876	\$25,644
Valley County	\$86,488,957	\$4,324,448	\$216,222
Wheatland County	\$15,321,089	\$766,054	\$38,303
Wibaux County	\$18,036,343	\$901,817	\$45,091
Yellowstone County	\$2,128,130,298	\$106,406,515	\$5,320,326

How You Can Help

- Think about what makes Montana special to you, and commit to give to your passion.
- Call the Montana Community Foundation, your local community foundation, or your favorite charity to learn about leaving a legacy for Montana's future.
- Create an estate plan, or adapt it to help a cause that is important to you.
- Talk to others about the importance of remembering their community in their plans.
- Give at least 5% of your estate to the causes that matter to you, now and for future generations.

