

Information for Donors and Executors or Estate Attorneys of Bequests Naming the Mountaineers Foundation

February 14, 2024

The Mountaineers (EIN Tax ID 27-3009280) is a Washington non-profit corporation, originally founded in 1906, and merging with its successor organization The Mountaineers of the Pacific Northwest in 2011, with the purpose of providing, among many other services and activities, a wide range of outdoor recreational activities, educational activities, training, charitable fundraising, conservation activities, and social events.

Keta Legacy Foundation (EIN Tax ID 23-7023350) is a Washington non-profit corporation that began doing business as Keta Legacy Foundation in 2018 after it was originally founded in 1968 as the Mountaineers Foundation, with the purpose of providing educational activities, grants, charitable fundraising, ownership of real property to conserve natural systems including the Rhododendron Preserve, and conservation activities. The organization officially changed its legal name to Keta Legacy Foundation in 2024 with the same EIN.

If you have named the Mountaineers Foundation in your estate, we urge you to clarify which of the two organizations you intend and to update the beneficiary information in your documents.

In February 2024, The Mountaineers and Keta Legacy Foundation agreed to dismiss legal claims against one another stemming from earlier disputes. While the settlement terms are confidential, both organizations have agreed that neither party will use the name “Mountaineers Foundation” in the future. We have also committed that any donations or bequests received naming “Mountaineers Foundation” as the beneficiary will be evaluated by leadership of each organization. Keta Legacy Foundation and The Mountaineers have defined a collaborative process to determine the donor’s intent and best honor the gift. Honoring the wishes of donors is an important shared value of both organizations.

If you are a Donor, please direct your support to either The Mountaineers or Keta Legacy Foundation.

If you are an Executor or Estate Attorney for a Bequest Naming the Mountaineers Foundation, we urge you to contact both The Mountaineers and Keta Legacy Foundation.

Both organizations have agreed to the following process for bequests where a donor is unable to clarify intent:

First, if a bequest lists both The Mountaineers and the Mountaineers Foundation separately, then both organizations have agreed that the proportion designated for the Mountaineers Foundation will go to Keta Legacy Foundation and that proportion designated for The Mountaineers will go to The Mountaineers.

If a bequest names one organization or its EIN but lists any of the Core Unique Services (see table below) of the other organization, then we urge Executors or Estate Attorneys to confer with both organizations to assist with donor intent before disbursing funds. Similarly, if a bequest

names only the Mountaineers Foundation without further clarification of donor intent, we urge Executors or Estate Attorneys to confer with both organizations to assist with donor intent before disbursing funds.

The Mountaineers and Keta Legacy Foundation will consider the following information to help identify donor intent:

- Did the person convey written legacy giving intent, participate in a legacy giving program of either organization, or through other form of communication with either organization?
- Did the person serve in an elected position or volunteer with either organization, and in which Core Unique Services?
- Did the person donate to either organization, and did the person identify specific funds dedicated to the Core Unique Services? Was the donation above the cost to attend an event or for membership dues?
- Does the bequest mention Core Unique Services for either organization?

Representatives from both organizations will compare research and attempt to reach agreement on donor intent. If both organizations reach agreement on the donor intent, that information will be shared with the Executor or Estate Attorney. If the organizations do not reach agreement on donor intent, both organizations will provide their research on donor intent with the Executor or Estate Attorney to help inform the decision.

Keta Legacy Foundation – Core Unique Services	The Mountaineers – Core Unique Services
<ul style="list-style-type: none"> • Conservation and preservation of the Kitsap Rhododendron Preserve, acquiring lands around, adjacent to, and near the Preserve for purposes of preservation and conservation • Community grants program or any successor programs • Land acquisition for conservation purposes related to Keta Legacy Foundation’s mission • Salmon protection and/or habitat restoration • Rhododendron Preserve Education Fund, or conservation education programs held at the Preserve • Capital campaigns for Keta Legacy Foundation initiatives • Rhododendron Preserve Second Century Fund 	<ul style="list-style-type: none"> • Outdoor activity education (youth and adult) • Scholarships for equitable access to the outdoors • Outdoor experience lodges and outdoor centers • Public lands conservation and advocacy • Education about protecting the environment and conserving the natural world, including protecting public lands, wildlife, and addressing threats such as climate change • Outdoor recreation access advocacy • Publications for outdoor education, conservation, natural history, and outdoor lifestyle • Outdoor theater productions at Kitsap Forest Theater

<ul style="list-style-type: none">• Maintenance of the Preserve or any part, including the bridge, pavilion, or Big Tree deck• Fundraising campaigns in support of any service identified above as a Keta Legacy Foundation Core Unique Service	<ul style="list-style-type: none">• Fundraising campaigns in support of any service identified above as a The Mountaineers CUS
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The Mountaineers and Keta Legacy Foundation are grateful for your support of our respective missions.

Jeff Wirtz, President – Keta Legacy Foundation
Gabe Aeschliman, President – The Mountaineers