



Notification of a Planned Gift

CONFIDENTIAL

Thank you for taking the time to share information with us about the planned gift included in your will. You are helping us plan for the coming years with the knowledge of your future support, while also giving us an opportunity to thank you, include you in our Legacy Oak Circle programs, and talk with you about what you care about most. If you encounter any questions in this process, please contact us at 541-747-3817 or development@mountpisgaharboretum.org

Name(s): _____

Address: _____

Email(s): _____ **Phone(s):** _____

May we send you updates, invitations, and personalized communications? Yes Not at this time

May we publish your name as part of our Legacy Oak Club? Yes Not at this time

Would you be willing to give a testimonial to encourage others? Yes Not at this time

Would you like to remain anonymous? Yes Not at this time

Details about your planned gift:

Please share as much as you feel comfortable sharing with us about your plans. All fields in this section are optional. All your information is strictly confidential, and will never be shared with anyone outside the organization.

Will: *details* _____ *value* \$ _____

Insurance Policy: *details* _____ *value* \$ _____

Revocable Living Trust: *details* _____ *value* \$ _____

Real Estate: *details* _____ *value* \$ _____

Charitable Remainder Trust: *details* _____ *value* \$ _____

Retirement Plan/IRA: *details* _____ *value* \$ _____

Other asset(s): *details* _____

total value \$ _____

We honor your intentions behind this gift, and recognize it as an investment in your values. Because funding streams and needs change, unrestricted funds are the most universally beneficial for us to sustain our programming and care of the Arboretum. Unless directed otherwise, it is Arboretum policy to allocate 1/3 of an Estate gift to our Endowment to care for the future. Please tell us where you would like your gift to go:

- Unrestricted**
- Education
- Habitat & Trails
- Accessibility

Is this gift contingent? Yes No

Anything else you would like to tell us about your gift?

Signature(s): _____

Date: _____
