



We hope you will accept our invitation to join the Legacy Society. A Legacy Gift to the Houston Botanic Garden in your estate planning will help sustain the Garden for generations to come.

The Legacy Society recognizes those who provide for the Houston Botanic Garden with a gift in their will or estate plans. Please join this dedicated group of donors who have taken this step to preserve the beautifully designed gardens and stimulating programs for the Garden.

Planned gifts are essential to providing the long-term financial support needed to sustain the Houston Botanic Garden. These gifts help to fund our educational and community outreach programs, maintain the highest professional horticulture standards, and bring delight and beauty to the lives of all who visit. The generosity of Legacy Society donors – large and small – will enable the Garden become one of the finest gardens in country and a destination for local, regional, national, and international travelers.

We would welcome a conversation with you to understand how you may desire to leave your footprint on the Houston Botanic Garden – whether that be for the Garden’s greatest needs – including operations, research and conservation efforts, technology upgrades – or restricting your bequest to sustain a particular feature such as the Global Collection Garden, Culinary Garden, children’s educational programming, endowing a director level (or higher) position, or seasonal change-out. All estate gifts are vital to developing and maintaining excellence.

## TYPES OF PLANNED GIFTS

**Bequests:** Specify in your will either a dollar amount or percentage of your estate that you want to go to Houston Botanic Garden, while retaining the use of your assets during your lifetime.

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**Charitable Remainder Trusts:** Transfer assets (e.g. appreciated securities) to a Charitable Remainder Trust and designating Houston Botanic Garden as a beneficiary of this Trust. You will receive guaranteed payments from the Trust for the rest of your life or for the joint lives of you and your spouse.

**Charitable Lead Trusts:** Transfer assets to a trust that pays a yearly income to Houston Botanic Garden for a specified number of years, and then returns the assets to you or your designated beneficiaries. The trust assets will not be included in your estate, providing income, gift and estate tax benefits.

**Gifts of Real Property:** Donate your home or other real estate to Houston Botanic Garden and receive immediate tax benefits, even if you continue to live in your home. This keeps the property out of your taxable estate.

**Life Insurance:** Transfer ownership of a paid-up life insurance policy to Houston Botanic Garden and receive an immediate tax deduction, as well as eliminate possible estate taxes.

**Retirement Benefits:** Name Houston Botanic Garden as beneficiary of IRA or other retirement plan assets, eliminating substantial income and estate taxes on these assets at the time of your death.

## PLEASE CONTACT US

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