

Advisor's Guide for Planned Giving

Gifts from Wills and Trusts:

When making a charitable gift to a nonprofit organization, it is vital the legal name of the charity, city and other identifying details be used. To name The Morton Arboretum in your will or trust please use the following suggested language:

Residual Bequest Language — A residual bequest comes to us after your estate expenses and specific bequests are paid.

I give and devise to The Morton Arboretum located in Lisle, Illinois, an Illinois not-for-profit charitable organization, all (or state a percentage) of the rest, residue and remainder of my estate, both real and personal, to be used for its general support (or for the support of a specific fund or program).

Specific Bequest Language — Naming The Morton Arboretum as a beneficiary of a specific amount from your estate is easy.

I give and devise to The Morton Arboretum located in Lisle, Illinois, an Illinois not-for-profit charitable organization, the sum of \$ (or asset) to be used for its general support (or for the support of a specific fund or program).

Contingent Bequest Language — The Morton Arboretum can be named as a contingent beneficiary in your will or personal trust if one or more of your specific bequests cannot be fulfilled.

If (insert name) is not living at the time of my passing, I give and devise to The Morton Arboretum located in Lisle, Illinois, an Illinois not-for-profit charitable organization, the sum of \$ (or all or a percentage of the residue of my estate) to be used for its general support (or for the support of a specific fund or program).

Gifts of Appreciated Securities:

Please contact the Development Department for a stock transfer form.

Beneficiary Gifts from Retirement Plans, Life Insurance, Brokerage Accounts or any other plan with a beneficiary designation:

Please contact your plan provider for a change of beneficiary form. Once you have filled out the form, please send a copy to the Development Department.

Legal name: The Morton Arboretum

Federal tax ID number: Please contact us for our federal tax ID number.

Located in: 4100 Illinois Route 53, Lisle, IL 60532-1293

Note to Attorneys, Accountants and other professional Advisors:

Thank you for helping your client with their charitable planning. If you have any questions or concerns, please call the Development Department, 630-725-2470, kspiess@mortonarb.org.