



PERENNIAL *Circle*

The Perennial Circle recognizes the foresight and generosity of our friends who have arranged a bequest or planned gift to New England Botanic Garden at Tower Hill.

Your membership allows us to honor you and your commitment to our mission of creating experiences with plants that inspire people and improve the world. Perennial Circle members enjoy opportunities for continued learning and experiences at the Garden, including:

- ❖ **Invitations** to the annual Paul E. Rogers Memorial Lecture, exhibitions and special tours.
- ❖ **Public recognition** in Perennial Circle listings. If you would prefer to remain anonymous, please contact the advancement office.
- ❖ **An annual event** with the CEO and members of the senior horticultural staff.
- ❖ **Flowering perennials** will be planted in your honor along the Perennial Path, an area of the Gardens for reflection and remembrance.

If you have already included New England Botanic Garden at Tower Hill in your estate plans, please let us know so we can recognize your generosity. If not, we would be happy to discuss your goals and how a legacy gift may work for you.

Free Estate Planning Guide 

❖ Before making an estate gift, we recommend seeking independent professional legal, accounting or investment council.

ESTATE PLANNING GUIDE

To assist you in your planning, we will send you a free Estate Planning Guide. To request your copy, contact sstanton@nebg.org.

MEANINGFUL WAYS TO MAKE A LEGACY GIFT

BEQUESTS:

- ❖ One of the most common ways to provide an enduring gift of support is including a gift to New England Botanic Garden at Tower Hill in your will or trust. You can specify an amount, a percentage, or remainder of the estate or trust.
- ❖ This flexible option can be revised at any time and allows you to take care of your family and the causes you care about. For suggested bequest language to use, visit our website at neblegacy.org.

BENEFICIARY DESIGNATIONS:

- ❖ You can name the Garden as the charitable beneficiary of your assets including an IRA plan, life insurance policies, donor-advised funds, or bank accounts. Simply request and complete a beneficiary designation form from the administrator of your plan.
- ❖ Did you know that retirement assets count against estate tax and are heavily taxed when left to loved ones other than a spouse? But tax-exempt organizations, like New England Botanic Garden at Tower Hill, receive the full amount with no tax due! This allows you to make a larger impact for future generations to come.

PERSONAL PROPERTY:

- ❖ Gifts of real estate offer an easy and tax efficient way to make a lasting contribution to the Garden. Your gift will help sustain the operations of the Gardens while also avoiding capital gains and reducing federal income tax.

IRA ROLLOVER:

- ❖ You can impact New England Botanic Garden at Tower Hill's mission and make a tax-free charitable gift by rolling over a portion of your IRA to the Garden. By doing so, you can satisfy your required minimum distribution (RMD) for the year and avoid taxes on transfers of up to \$100,000 from your IRA to the Garden.
- ❖ To make a transfer, you must be age 70 and 1/2 or older. Transfers must be made directly from your IRA administrator to New England Botanic Garden at Tower Hill. Contact your administrator to rollover your IRA to charity, and reach out to us to speak more about this opportunity or to let us know to expect your gift.

Your continued engagement with New England Botanic Garden at Tower Hill will support our shared vision of a world where people and plants thrive. Thank you.

Contact:

Sally Stanton
508.869.6111 x103
sstanton@nebg.org

New England Botanic Garden at Tower Hill
PO Box 598
Boylston, MA 01505

CONFIDENTIAL

Tell us about your gift

Thank you for your planned gift commitment to New England Botanic Garden at Tower Hill, owned and operated by the Worcester County Horticultural Society. Your lasting investment will ensure the Gardens remain a model of horticultural excellence and environmental stewardship for generations to come.

Please take the time to fill out this form so we can better understand your gift intentions. The information you provide is not legally binding, and we understand that you may wish to change your gift in the future. If you have any questions, contact our Advancement Office at 508-869-6111 x103 or email ssanton@nebg.org.

Name(s): _____

Year(s) of Birth: _____

Address: _____

Phone: _____ Email: _____

You will receive occasional email updates from NEBG. We will not sell, rent, or exchange our email address.

About Your Gift

If you are willing to disclose more information about your gift, please check all that apply and estimate the value of each gift in today's dollars.

- | | |
|---|--|
| <input type="checkbox"/> Will: \$ _____ | <input type="checkbox"/> Insurance Policy: \$ _____ |
| <input type="checkbox"/> Revocable Living Trust: \$ _____ | <input type="checkbox"/> Real Estate: \$ _____ |
| <input type="checkbox"/> Charitable Remainder Trust: \$ _____ | <input type="checkbox"/> Retirement Plan/IRA: \$ _____ |
| <input type="checkbox"/> Other asset(s): \$ _____ | \$ _____ |

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- Public recognition in Perennial Circle listings. If you would prefer to remain anonymous, please contact the advancement office.
- Flowering bulbs planted in your honor along the Perennial Path, an area of the Gardens for reflection and remembrance.

How would you like to be recognized for your gift?

I/We would like to be listed as (a) Perennial Circle member(s). Please list my/our name(s) as _____

I/We wish to remain anonymous for this gift.

Signature(s):

Date: _____